TOURISM

BRITISH COLUMBIA MEETING MARKET STUDY

SUMMARY REPORT

ECONOMIC & REGIONAL DEVELOPMENT AGREEMENT

Canada

BC

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BRITISH COLUMBIA MEETING MARKET STUDY
SUMMARY REPORT

Prepared for:
Industry, Science and Technology Canada
Ministry of Tourism
Ministry of Regional and Economic Development

Funded by:
Canada - British Columbia Tourist Industry
Development Subsidiary Agreement

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The responsibility for the content of this report is the consultant's alone, and the conclusions reached herein do not necessarily reflect the opinions of those who assisted during the course of this investigation or the federal and provincial governments which funded the study.

Industry, Science and Technology Canada
Industrie, Sciences et Technologie Canada

Province of British Columbia
Ministry of Tourism

BC
Ministry of Regional and Economic Development

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SECTION A

INTRODUCTION

1. STUDY PURPOSE

British Columbia has received increasing national and international exposure in recent years due to the economic ties the province has forged in the Pacific Rim and the hosting of Expo '86 in Vancouver. As a result, British Columbia's appeal has grown, particularly in the areas of tourism and related industries. A determination now exists in this province to capitalize on the opportunities this exposure and appeal has given us. The task currently facing the province's tourism industry is to sustain and develop initiatives which have emerged from the province's growing recognition.

One of the areas which has shown promising growth in recent years is the "meeting market". This term refers to the meetings, conferences, conventions and trade shows which are held in meeting facilities throughout the province. These facilities include conference centres, trade and convention centres, hotels, resorts and a range of public buildings, such as arenas, halls and multiplex buildings, whose primary market may not be meetings but are, nevertheless, used to service this market.

To date, little information specific to British Columbia had been collected about the potential of the meeting market, particularly the larger meetings that attract over 100 attendees. The purpose of the British Columbia Meeting Market Study was to inventory the British Columbia meeting product and determine and identify demand sources within Canada and the United States which have the greatest potential of travelling to British Columbia for meetings and which, therefore, represent the best market opportunities for the British Columbia meeting product.

2. OVERVIEW OF APPROACH

The Meeting Market Study was conducted over a 15 month period from October 1988 to December 1989. It focused on three subjects essential to understanding the status and future potential of the meeting market: current British Columbia meeting facilities; meeting attendees; and, meeting planners. Consequently the approach to the study consisted of three distinct and overlapping phases.

Current Facilities

This section of the study consisted of two parts: a review of existing materials that provide information concerning meeting facility inventories; profiles of users and other relevant data; and, a survey of operators of facilities with a capacity for 100 meeting attendees or more. Product Inventory and Market Profile questionnaires were developed and forwarded to management at these facilities with the intent of creating an inventory of the British Columbia meeting product, identifying quality, size, markets, volumes of business and range of services. The total mailing list included approximately 300 properties.

Meeting Attendees

From December 1988 to December 1989, a sample of meetings held in British Columbia was selected for distribution of diaries to meeting attendees. The sample of meetings concentrated on the total meeting market including both locally generated meetings as well as the destination meeting market. A meeting was defined as any gathering which is attended by non-local people who stay in a hotel in order to attend. In total, 44 meetings were surveyed and diaries distributed to 2,088 attendees.

The main objective of this section of the study was to collect information regarding the activities meeting attendees participate in during their stay in British Columbia, the amount of money they spend, the characteristics of their travel and their impression of British Columbia.

Meeting Planners

Meeting planners were approached in two ways. Firstly, focus groups were conducted with 61 meeting planners in Seattle, Los Angeles, Chicago, Washington, D.C., Toronto and Ottawa. The intent of the focus groups was to discuss the image and knowledge meeting planners have of British Columbia, to investigate their process for planning meetings and to discuss the best method of communicating information to them.

Secondly, after the focus groups were completed, a telephone survey was conducted with approximately 600 meeting planners across North America. The intent of the survey was to address issues such as the characteristics of the planners' largest meeting, the decision making process for planning a meeting, how British Columbia locations are perceived and how information is obtained. In addition, descriptive characteristics of the organization itself were also obtained (size, type of business/association, etc.).

Along with the collection of hard data on the meeting market, the intent throughout the study was also to develop marketing recommendations and initiatives for the Ministry of Tourism (Ministry) and the meetings industry in general.

SECTION B

PRODUCT INVENTORY AND MARKET PROFILE REPORT

1. INFORMATION ACCESS

The main objective of this section of the Meeting Market study was to create a detailed inventory of meeting facilities in order that both the province and the private sector can provide up-to-date information to prospective meeting groups. To this end, information from the Product Inventory questionnaire will be combined with the current Ministry of Tourism convention and meeting facility inventory to create the most up-to-date listing of British Columbia meeting facilities. All information collected from the Product Inventory questionnaire is available from the Meetings and Incentive Travel Department of the Ministry of Tourism.

2. OVERVIEW OF PRODUCT INVENTORY

Growth in volume of meeting facilities, particularly in urban settings, usually follows local economic and population growth. From the time of the recession in the early 1980's to the latter part of the decade, few full facility hotels have been built in British Columbia and therefore the supply of meeting space from this source has increased little. However, interest in hotel development, particularly in Vancouver, Victoria and Whistler increased in the latter part of the 1980's due to an improvement in their local economies.

In each of these three cities, a major conference/trade and convention centre has been built over the past five years, significantly adding to the ability of the respective cities to accommodate large meeting groups of over 100 attendees. Along with meeting space, the meeting product a city has to offer meeting planners includes other elements such as the supply and quality of guest rooms, amenities and attractions available in the area etc. In terms of the meeting space and guest rooms, the meeting product in Vancouver, Victoria and Whistler, and the province in general can be characterized as follows:

Vancouver

- in general, meeting rooms have been well maintained;
- quality of hotel guest rooms is generally comparable to or better than that of hotels in other major North American cities, in part due to the extensive of upgrading and renovations that took place prior to Expo '86;
- the Vancouver Trade and Convention Centre opened in 1987 adding significantly to the capacity level of meeting space in Vancouver; and,
- at the time of report writing, there are plans either rumoured or proposed, for the addition of approximately 2,000 new hotel rooms in the Lower Mainland market in three separate luxury hotel developments, adding to the supply of both meeting space and luxury hotel rooms.

Victoria

- the opening of the Victoria Conference Centre in 1989 significantly added to the supply of high quality meeting space available in Victoria;
- during 1989, the Hotel Grand Pacific opened, the Empress Hotel completed extensive renovations and the Laurel Point Inn added to its guest room complement; and,
- at the time of report writing, there are five hotel developments proposed or rumoured for Victoria that would add to the meeting space and guest rooms available. Victoria will have an adequate supply of quality guest rooms to offer meeting attendees.

Whistler

- the Whistler Conference Centre opened in 1985, providing Whistler with a good quality meeting space to cater to large meetings;

- the opening of the 343 room Chateau Whistler Resort in 1989 added extensive meeting and guest room space to the Whistler marketplace; and,
- interest in hotel development in general and, more specifically, internationally recognized hotel companies continues at Whistler which will enhance Whistler's potential to attract meeting business.

Other British Columbia

- as per Pannell Kerr Forster research, in general, guest and meeting rooms in older hotel properties found elsewhere in British Columbia have not been subject to a regular renovation programme;
- many older meeting rooms suffer from design constraints, such as poor ventilation systems or posts in the middle of the room that obstruct visibility;
- the Penticton Trade and Convention Centre, built in 1965, completed a renovation and expansion programme in 1988 improving its appeal; and,
- interest in hotel and resort development has been evident in Kelowna and Kamloops. In particular, a major lakeside hotel and conference facility development is proposed in Kelowna that would allow the city to cater to meetings of up to approximately 1,000 people.

Depending on their location and type, meeting facilities will attract varying degrees of association and corporate meeting business from the local market or further afield. Traditionally, most of the larger British Columbia based associations and businesses chose Vancouver as their meeting site because of the quality and size of meeting facilities, ease of transportation and convenience. With the opening of the Vancouver Trade and Convention Centre in 1987 and the increased national and international exposure Vancouver has received as a destination for visitors, Vancouver now attracts more meeting business from outside the province. As competition for meeting space in Vancouver becomes more intense, British Columbia based associations and businesses may be forced to seek other meeting sites, possibly in the communities surrounding Vancouver, i.e. Richmond, Burnaby, etc. or elsewhere in British Columbia. Consequently, the potential for development of new meeting space is increasing.

Substantial population growth in Greater Vancouver (particularly Richmond, Surrey and Coquitlam) and a trend towards relocation of companies to outlying communities also indicates an increasing demand for meeting space. This demand will, however, likely be for day usage of meeting space, i.e. weddings, banquets, luncheons, etc.

3. EXISTING FACILITIES

Meeting facilities currently existing in the province can be grouped in three categories: accommodation properties with meeting facilities (includes hotels, motels, motor inns and resorts); conference/trade and convention centres; and, public facilities such as stadiums, arenas, halls, multiplex buildings and colleges that can be used for meetings but where the use of the facility as a meeting venue may be secondary to its primary purpose.

The vast majority of meeting space is found in accommodation properties. The quality level does, however, vary significantly between properties. The quality level between guest rooms and meeting space within a particular property may vary as well since guest rooms and meeting space are not always upgraded at the same time.

Most communities in British Columbia have some sort of public facility that can be used as meeting space, such as a recreation centre or town hall. Since they are often multi-function buildings, they tend to be less attractive and less functional as meeting space than single purpose meeting space found in accommodation properties and convention centres.

The four conference/trade and convention centres in Vancouver, Victoria, Whistler and Penticton are all high quality facilities largely due to the fact that they are fairly new or, as in the case of Penticton, have undergone recent renovation.

The following table shows the number of meeting facilities available in the province, broken down by tourism region and type of facility, that are able to accommodate meeting groups of 100 people. For example, where the number of guest or meeting rooms is provided for a region, it is based only on those properties that have a meeting room capacity of at least 100 people. This table is based on information available from the Ministry of Tourism (the Convention and Meetings Guide updated to January 1990) and supplemented with information compiled from the Product Inventory questionnaire. This inventory represents all meeting facilities available in British Columbia that can accommodate groups of 100 or more people.

TABLE B-1

PROVINCIAL TOTAL

	TOTAL NUMBER OF			LARGEST * THEATRE CAPACITY			LARGEST * BANQUET CAPACITY			LARGEST * RECEPTION CAPACITY			MEETING FACILITY BREAKDOWN		
CITY	MEET. FACIL.	MEET. ROOMS	GUEST ROOMS	HOTELS	PUBLIC FACIL.	CONV CENTRE	HOTELS	PUBLIC FACIL.	CONV CENTRE	HOTELS	PUBLIC FACIL.	CONV CENTRE	HOTELS	PUBLIC FACIL.	CONV CENTRE
A: Vancouver Island	74	812	4,590	600	3,500	1,500	550	2,000	1,000	700	5,000	1,500	54	19	1
B: Southwestern B.C.	78	762	12,503	1,650	3,500	11,070	1,300	1,000	7,940	1,500	1,200	1,800	66	10	2
C: Okanagan/Similk.	25	104	2,153	700	1,100	443	650	700	2,200	700	1,070	1,600	22	2	1
D: Kootenay Country	16	50	523	300	1,200		350	1,200		400	1,200		11	5	0
E: High Country	23	62	1,079	500	4,000		350	3,000		550	3,000		16	7	0
F: Cariboo	12	28	388	500	1,200		400	900		500	900		7	5	0
G: North by Northwest	31	96	1,597	0	3,000		470	1,500		600	1,400		20	11	0
H: Peace Riv/Alaska Hwy	7	17	333	500	425		400	425		500	425		4	3	0
I: Rocky Mountain	21	68	1,357	450	2,500		500	2,200		500	2,200		12	9	0
TOTAL	287	1,999	24,523										212	71	4

* Represents largest capacity at a single facility.

There are 287 facilities in the province that can handle meetings of 100 attendees or more. Of these facilities, 212 are part of an accommodation property, 71 are public facilities and four are conference/trade and convention centres. Vancouver Island and Southwestern British Columbia tourism regions contain 79 percent of the provincial total of meeting rooms in accommodation properties, conference/trade and convention centres and public facilities able to accommodate groups of 100 people. In particular, 56 percent of the meeting rooms are found in Vancouver and Victoria.

4. MARKET PROFILE

Due to the low response to the Market Profile questionnaire, an analysis of the data received would be inconclusive. The one conclusion that can be made from the Market Profile questionnaire, however, is that management at most meeting facilities in British Columbia is, at this time, unable to provide documentation regarding the meeting market. This information would be invaluable in gauging historical performance and directing future marketing.

5. CONCLUSION

Although each tourism region has meeting facilities that can accommodate groups of 100 or more people, the regions vary in terms of the number, type and quality of meeting facilities which, in turn, will dictate the size, origin and type of meeting groups that the tourism region, and particular community, can attract.

In order to attract meeting business, the Ministry of Tourism and the industry in general must be able to supply meeting planners with up-to-date information about the meeting facilities available in the province. This requirement lead to the main objective of this section of the Meeting Market study; to create an inventory of meeting facilities available in the province capable of accommodating meeting groups of 100 attendees. This information must, however, be updated on a regular basis and every effort must be made to receive information from those meeting facilities that did not complete the Product Inventory questionnaire.

SECTION C

MEETING PLANNERS SURVEY

This section of the Meeting Market study summarizes the key findings of the focus group sessions and telephone survey conducted with meeting planners throughout North America. The findings are allocated to planners in four geographic areas: Western United States, Eastern United States, Western Canada and Eastern Canada.

1. BRITISH COLUMBIA'S SHARE OF THE MEETING MARKET

Size of the Total Market

- the majority of meetings held by meeting planners have between one to 100 people attending. The average number of meetings held by all organizations in this size bracket ranges from 20 meetings by Western United States planners to 41 meetings by Eastern United States planners. In comparison, the average number of meetings held of over 1,000 attendees ranges from .1 by Western and Eastern Canadian planners to .4 by Eastern United States planners; and,

- the average number of meetings held by all planners surveyed ranges from 25 meetings by Western United States planners and 52 meetings by Eastern United States planners.

Future Growth of the Total Market

- among those planners not located in Western Canada, the meeting market appears to be growing steadily. Thirty percent of planners who had not held a meeting in British Columbia in the past felt that the number of meetings held by their organization will increase a little or a lot compared to approximately 55 to 63 percent of planners from elsewhere in North America.

British Columbia's Actual Share of the Meeting Market

- only five percent and three percent respectively of those planners in the Western and Eastern United States held meetings in British Columbia in the previous year compared to 37 percent and 47 percent respectively of planners in Eastern and Western Canada;

- among planners in Western Canada 100 percent of British Columbia planners held a meeting in the province compared to only 14 percent of Alberta planners; and,

- less than one percent of meetings planned by American planners in the previous year were held in British Columbia however this represents a substantial amount of business for British Columbia. Our sample indicates that a third of the meetings held in British Columbia come from the United States.

Size of British Columbia's Potential Share of the Meeting Market

- the potential to increase the number of meetings held in British Columbia from United States planners is substantial. Among planners from the Western United States, British Columbia's share would increase eight times if all the planners who say they could come to British Columbia were convinced to do so. In the Eastern United States, a similar change would expand market share over 14 times.

2. CHARACTERISTICS OF THE PLANNERS' LARGEST MEETINGS

Size of the Largest Meeting

- United States planners tend to report substantially larger meetings in comparison to their Canadian counterparts. The median number of people that attended the largest meeting held by the planner's organization during the past year ranged from 300 people for Western Canadian planners to 675 people for Eastern United States planners.

Location of the Largest Meeting

- of the 3.4 percent of respondents who cited Vancouver as the location of their largest meeting, half were from British Columbia, and 20 percent were from Ontario, with the remainder coming from Alberta (five percent), Washington (ten percent), Oregon (five percent) and other states within the United States (five percent); and,

- among organizations choosing other locations in British Columbia as the site of their largest meeting, 77 percent were British Columbia organizations.

3. MEETING PLANNERS' AWARENESS OF BRITISH COLUMBIA CITIES

Awareness of British Columbia Cities in the Context of Canadian Cities

- the focus group discussions revealed that British Columbia enjoys a very positive image in the minds of planners; and,

- more planners consider Vancouver as the location for a future meeting of their organization than any other Canadian city, ranging from 47 percent of Western Canadian planners to 66 percent of Eastern Canadian planners. The mention of Vancouver may be weakest among Western Canadian planners because of the tendency of some Alberta organizations not to consider locations outside of Alberta.

Familiarity with Vancouver's Hotels and Meetings Facilities

- the focus group discussions revealed that, except for planners in Seattle, American planners have a universal lack of detailed knowledge of Vancouver's hotels and facilities. Although they have positive images of Vancouver and believe that it would be a good place to hold a meeting, some feel that British Columbia has not succeeded in delivering the information they need.

Familiarity with Vancouver as a Tourist Destination

- several planners in the focus groups said that they often sell their meetings on the basis of the activities that are available for the spouses or for the attendees themselves to do in their spare time; and,

- three quarters of the planners from the Eastern United States said that they are either not very familiar or not at all familiar with Vancouver as a tourist destination. Familiarity is much higher for planners elsewhere in North America, especially in Canada, where nine out of ten planners are somewhat familiar or very familiar with Vancouver as a tourist destination.

Identity of British Columbia Cities Other than Vancouver with which Planners are Familiar

- United States planners, other than those in Seattle, who participated in the focus groups were seldom able to name a meeting site in British Columbia other than Vancouver; and,

- of those cities in British Columbia, other than Vancouver, that planners in the telephone survey were familiar with, Victoria was noted most often, ranging from seven percent of Eastern United States planners to 51 percent of Eastern Canadian planners.

4. MEETING PLANNERS' IMAGE OF BRITISH COLUMBIA

Perceived Cost

- in general, planners do not view Vancouver to be a costly place to hold a meeting, at least in the context of other major North American cities.

Adequacy of Facilities

- in general, reactions to facilities in British Columbia are very positive; and,

- planners in the focus groups mentioned only two inadequacies with Vancouver's facilities. First, the size of the convention centre does not fit all planners needs. Second, in the view of some of the planners, there are too few luxury hotel rooms to handle the largest meetings.

Transportation

- the cost and difficulty of transportation to British Columbia stand the province at a distinct disadvantage vis-a-vis competing destinations. Planners want to get their people to a meeting within one travel day. Due to difficult connections, this is sometimes impossible from Eastern United States locations. The problem is exacerbated by the need to move large numbers of people on the same day.

Weather

- while Vancouver has a reputation as a rainy location, the weather does not influence many planners when choosing a meeting site except when specifically choosing a sun destination.

Most Attractive Features of Vancouver

- Vancouver's location is its most valued feature to planners, whether in reference to its location in relation to other places, its waterfront location, its Pacific Rim characteristics or other references to location.

5. BARRIERS TO HOLDING MEETINGS IN BRITISH COLUMBIA

Specific Organization Policy

- the number of planners noting a specific policy in their organization that prevents them from holding meetings in British Columbia ranges from ten percent of Eastern United States planners to 19 percent of Western Canadian planners. However, 31 percent of planners from Alberta noted that such a policy exists in their organization.

Specific Reasons For Not Meeting in British Columbia

- the reasons noted most often by planners not planning to hold a meeting in British Columbia and that did not have an organizational policy forbidding them from meeting in the province are that it is not British Columbia's turn, the planner wants to stay close to home or the distance/cost factor is a deterrent.

Barriers to Holding a Meeting in Vancouver

- approximately a third of planners in the telephone survey who had at least some familiarity with Vancouver noted that there is a major barrier for their organization to hold a meeting in the city. The barriers noted most often are the travel distance/remote location of Vancouver and travel costs. American planners also noted customs/duties/taxes as being a significant barrier.

Barriers to Holding a Meeting in Another City in British Columbia

- approximately 40 to 48 percent of those planners who had some familiarity with a city other than Vancouver in British Columbia noted that there was a major barrier to holding a meeting in this city. The most often noted reason was, as with Vancouver, the travel distance/remote location of the city.

6. WHERE MEETING PLANNERS GET THEIR INFORMATION ABOUT SITES

Magazines Received by Meeting Planners

- the two most often mentioned publications that planners receive regularly by meeting planners are "Meetings and Conventions" and "Successful Meetings". The former is the dominant publication in the American market.

Reaction to a Videotape

- about 80 percent of American planners and between 66 percent and 80 percent of Canadian planners felt that a videotape was either a good or excellent way to communicate information.

Advertising Penetration and Medium

- penetration levels for British Columbia advertising are relatively positive. The number of planners saying that they had seen advertising for specific meeting destinations or facilities in British Columbia in the past year ranged from 58 percent of American planners to 95 percent of Eastern Canadian planners. The most often mentioned medium for seeing advertising was magazines or other publications, noted by approximately 50 percent of planners.

Best Way to Receive Information About British Columbia Meeting Sites

- direct mail is, by a substantial margin, the preferred means of receiving information about British Columbia's meeting sites and facilities. Direct mail was mentioned as the best way to receive information about British Columbia meeting sites by 66 percent of Western Canadian planners and by between 83 percent to 88 percent of planners from elsewhere in North America.

7. DECISION MAKING PROCESS LEADING TO THE SELECTION OF A MEETING SITE

Reasons for Selecting a Site for the First Time

- ease of access and the adequacy of meeting facilities are the two most often mentioned reasons for choosing a meeting site for the first time.

Role of Meeting Type

- the purpose of the meeting and the profile of meeting attendees influences the choice of a meeting site. For example, trade shows tend to be located in major markets, close either to buyers and/or sellers. Also those meetings where attendance is voluntary place a high priority on the attractiveness of the setting and the price of the meeting package.

8. CONCLUSION

The success that has been achieved to date in attracting meeting business is minimal in contrast to the potential that exists. British Columbia has come closest to achieving its fair market share with Western Canadian meeting planners. However, potential clearly exists to attract more meeting business from planners elsewhere in North America. Penetration to date, particularly from the United States has been modest and there are many more planners who say they could hold meetings in the province than have done so in the past.

Vancouver, in particular, enjoys a high level of awareness among planners from throughout North America. What they require is factual information about the services and amenities the city can offer meeting planners. Awareness decreases substantially for other locations in the province. Clearly, greater name awareness is needed for locations outside the Lower Mainland.

SECTION D

MEETING ATTENDEES REPORT

The main objective of the meeting attendees survey was to gather information regarding the activities meeting attendees participate in during their stay in British Columbia, the amount of money they spend, the characteristics of their travel, i.e. length of stay, number of people in the travelling party, etc., and their impression of British Columbia. The key findings from the survey are summarized as follows:

1. DESCRIPTION OF MEETING ATTENDEES

Attendee Demographics

- the majority of meeting attendees are between the ages of 35 and 54. Thirty-three percent are between 35 to 44 years of age and 28 percent are between 45 to 54 years of age; and,

- meeting attendees are, in general, a more affluent segment of society. The median total family income of meeting attendees (Canadian dollars) is $56,923.

Number of Trips Made in the Past Year

- meeting attendees report that they take about 12 trips per year, on average, of which approximately seven are business trips, three are pleasure trips and the remainder are combined business and pleasure trips; and,

- a third of the trips are more than 1,000 miles.

Number of Trips Made to British Columbia in the Past Three Years (Non-Residents Only)

- meetings attract a substantial number of first time visitors to British Columbia. Only 27 percent and 25 percent respectively of non-resident meeting attendees had made either a pleasure or business trip to British Columbia in the past three years.

2. DESCRIPTION OF THE TRAVELLING PARTY

Number and Sex of Persons in the Travelling Party

- the meeting attendee travelling party consists of 2.5 people of which .5 persons is a child; and,

- males and females are almost evenly distributed in the travelling party with 52 percent being male and 48 percent female.

3. PRE-TRAVEL DECISION MAKING

Who Made the Decision to Attend the Event?

- most attendees make their own decision to attend an event rather than their employer or organization making the decision. Fifty-six percent of attendees who are residents and 51 percent who are non-residents said they made their own decision to attend an event while 37 percent and 42 percent respectively said their employer or organization made the decision to attend the event.

- the decision to attend the event, however, will depend on the type of event, i.e. whether attendance is compulsory or non-compulsory.

Requests for Information

- attendees receive information about the meeting destination primarily from the event organizer as opposed to a travel agent, Tourism British Columbia or other sources.

4. TRIP CHARACTERISTICS

Main Purpose of Trip

- not surprisingly, 79 percent of attendees say the primary purpose of their trip is to attend a conference or convention. The most often noted secondary purpose of the trip is to visit friends or relatives, mentioned by 26 percent of attendees.

First Visit to British Columbia (Non-Residents Only)

- thirty-five percent of non-resident meeting attendees are first time visitors to British Columbia.

Length of Trip

- attendees spend 6.2 nights away from home when travelling to British Columbia for a meeting; and,

- of the total number of nights away from home, 4.8 nights are spent in British Columbia with 3.7 nights spent at the meeting and 1.1 nights spent on a pre or post trip.

5. REACTIONS TO BRITISH COLUMBIA

Comparison of British Columbia to Other Meeting Sites

- British Columbia receives favourable comparison to other meeting sites with 66 percent of meeting attendees saying that it is either a little better or much better than other meeting sites.

General Impression of British Columbia

- the percentage of attendees who express unhappiness of any kind is small in comparison to those who give positive feedback. Fifty-nine percent of attendees did not answer a question pertaining to what they liked least about the British Columbia location; and,

- the locational features of British Columbia are liked best by meeting attendees, i.e. beautiful city, natural surroundings, etc. with the meeting facilities and service also receiving positive response.

6. ATTENDEE ACTIVITY AND EXPENDITURE INFORMATION

Activities

- the following table notes the proportion of days spent in a variety of activities and indicates possible potential for increasing the amount of time spent in various activities:

TABLE D-1
ACTIVITIES

Table entries represent the proportion of the total number of visitor days spent in each of the activities.

Attended:	
Conference/convention	62%
Corporate meeting	3%
Trade show	11%
Sporting event	2%
Festival/cultural/special event	7%
Activities:	
Shopping	32%
Took a tour	9%
Sightseeing	27%
Travelling/passing through	6%
Conduct business	26%
Hunting	*
Fishing	*
Other outdoor activities	5%
Skiing	1%
Golf	2%
Fitness	6%
Other sporting activities	1%
Nightlife	23%
Visited:	
Beach/lake shore	12%
Museum	8%
Fair/amusement park	2%
Garden/park	14%
Visit friends/relatives	17%
Base	(925)

* Less than one percent.

Daily Expenditures

- the daily expenditures for the travelling party are detailed below:

TABLE D-2

DAILY EXPENDITURES BY TYPE AND DAILY TOTAL EXPENDITURES

Accommodation	$85.25
Auto transportation	$9.14
Other transportation	$7.10
Meeting or package *	$20.70
Restaurants	$40.85
Groceries/beverages	$5.86
Recreation	$2.51
Entertainment	$4.63
Shopping/souvenirs	$24.28
Other	$3.34
TOTAL	$203.66
Base	(876)

* Category used when a fixed price was paid for a combination of services (eg. hotel and food).

- expenditures vary depending on the origin of the meeting attendee. Daily total expenditures ranged from $181.48 to $190.50 respectively for Western Canadian and American attendees and $202.80 to $258.55 respectively for Eastern American and Canadian attendees;

- Western Canadian attendees spend from $20.00 to $37.00 less on accommodation than attendees from elsewhere in North America;

- daily expenditures vary depending on whether or not the attendee is involved in a meeting on a particular day. On those days when an attendee is participating in a meeting, the daily total expenditure for the travelling party is $226.67 compared to $154.02 on those days when not participating in a meeting, such as on a pre or post trip;

- the major difference in expenditures between meeting or non-meeting days is found in the accommodation category. On those days when not participating in a meeting, expenditure on accommodation is $44.00 less than on meeting days. This likely correlates to 26 percent of attendees noting that a secondary purpose of their trip is to visit friends or relatives; and,

- the table below gives a summary of key expenditure and trip characteristic data:

TABLE D-3
EXPENDITURES PER TRIP AND PER CAPITA

Average daily expenditure per party	$203.66
Average length of trip (in British Columbia)	4.8 nights
Average total expenditure per party	$977.57
Average party size	2.5 persons
Average daily per capita expenditure	$81.46

Economic Impact of the Meeting Market

A substantial amount of money is spent by meeting attendees in the province. The average total expenditure per meeting attendee travelling party in 1989, as derived from this study, is $977.57. It is difficult, however, to estimate with certainty the total average expenditures made by all meeting attendees in the province over the course of a year without information regarding the volume of meeting attendees and the annual number of meetings held in the province. The Market Profile questionnaire sent to all meeting facilities in the province able to handle meetings of over 100 attendees requested this information. Due to the low response to this questionnaire, a precise estimate of the total number of meetings held in the province or the number of attendees at these meetings cannot be derived at this time.

Instead, four key meeting centres have been used to estimate the economic impact made by meeting attendees in the province. The four centres were chosen because representative delegate information could be obtained for each centre and, it was possible, based on information derived from this study, to produce the average expenditures for three of the four centres (Vancouver, Victoria and Whistler).

The following represents an estimate of total annual expenditures by convention/meeting delegates in 1989 in the Greater Vancouver Regional District, and at the Victoria Conference Centre, the Whistler Conference Centre and the Penticton Trade and Convention Centre. The expenditure data refers to all days spent in the province by the travelling party.

Depending on the manner in which delegate information has been supplied, a figure of average total expenditure per party or average daily expenditure per party has been used. If the total number of delegates has been supplied, then the average total expenditure per party has been used to take into account expenditures per day over the time period the travelling party was in the province. However, where a figure of total delegate days has been supplied, as in the case of the Whistler Conference Centre and Penticton

Trade and Convention Centre, the average daily expenditure has been used because the time frame in which the delegate was in the province has already been taken into account in the delegate days calculation (number of delegates multiplied by number of days). It should be noted that this second form of calculation may under represent total expenditures since the delegate days figure does not take into account pre and post meeting trips.

It should also be noted that a percentage of the total number of meeting attendees will be people who may choose not to pay for accommodation while attending a meeting because they live in the city in which the meeting is held. Consequently, per party expenditures would be less. Only those people staying overnight away from home, were included in the study meeting attendee sample.

Since the number of attendees per travelling party is unknown, a range of total expenditures must be calculated assuming that there is either one or two meeting attendees per party and, as per the screening interview, .5 children per travelling party. The two adults in the travelling party may be either one attendee who, for example, is accompanied by a spouse, or two attendees that share a room and assume that their travelling party includes their room partner(s). It is, however, likely that the following estimates are in the higher range, based on the assumption that most attendees interpreted "immediate travelling party" to mean themselves and other non-attendees accompanying them.

Greater Vancouver (includes Vancouver and surrounding municipalities):

Average Total Expenditure Per Party, Per Trip for Vancouver	=	$1,119.96
1989 Total Number of Delegates (Source: Tourism Vancouver)	=	217,460

The total estimated expenditures by delegates/attendees in Vancouver in 1989 ranged from $121,773,251 to $243,546,502.

The following expenditure calculations for the Victoria Conference Centre, the Whistler Conference Centre and the Penticton Trade and Convention Centre refer only to meetings held at those centres and not to meetings held elsewhere in their respective communities. Delegate figures in general for each of the respective communities is not available.

Victoria Conference Centre:

Average Total Expenditure Per Party, Per Trip for Victoria	=	$729.41
1989 Total Number of Delegates - Multiple Day Events (Source: Victoria Conference Centre)	=	24,140

The total estimated expenditures by delegates/attendees at the Victoria Conference Centre in 1989 ranged from $8,803,979 to $17,607,957.

Whistler Conference Centre:

Average Daily Expenditure Per Party, Per Trip for Whistler	=	$159.55 per day
1989 Total Delegate Days (Number of Delegates Multiplied by Number of Days) (Source: Whistler Conference Centre)	=	104,009

The total estimated expenditures by delegates/attendees at the Whistler Conference Centre in 1989 ranged from $8,297,318 to $16,594,636. As mentioned previously, since the delegate days figure does not include pre and post meeting activity, this estimate of expenditures should be viewed as conservative.

Penticton Trade and Convention Centre:

Average Daily Expenditure Per Party, Per Trip for Province = $203.66

1989 Total Delegate Days = 83,000
(Source: Penticton Trade and Convention Centre)

The total estimated expenditures by delegates/attendees at the Penticton Trade and Convention Centre in 1989 ranged from $8,451,890 to $16,903,780. As with the previous range of expenditures for Whistler, this estimate should be viewed as conservative since the delegate days figure does not take into account pre and post meeting activity.

These four centres represent a range in total expenditures by meeting attendees in 1989 of $147,326,438 to $294,652,875.

As mentioned previously, it is difficult to estimate meeting visitor expenditures on a provincial basis with certainty because the total number of delegates for the province is not known. The Meetings and Incentive Travel Department of the Ministry of Tourism estimates that these four centres represent approximately 75 percent of the meeting business in the province. Based on this estimate, the total provincial meeting visitor expenditures in 1989 can be approximated to range from $196,435,251 to $392,870,500.

Total expenditures by meeting attendees represent a direct impact on the economy. This impact is however only part of the economic impact resulting from the meeting market. There are other direct and indirect revenues that also have a positive effect on the economy. The direct impact of the meeting market includes any gross revenues attributed to meeting attendees or planners. Therefore an item such as rental of the meeting facility would be part of the direct impact of the meeting market. Gross revenues are then distributed through the economy in such form as wages and salaries and the purchase of goods and services. Indirect revenues would include items such as expenditures made by the meeting facility, hotel, etc. to service a meeting, such as payment to local suppliers.

Research conducted for this study only allows for an estimate of one part of the total economic impact of the meeting market, albeit a significant part. It must, however, be kept in mind that there are other direct and indirect benefits of the meeting industry that cannot be measured as part of this study. This does not however lessen their importance to the economy.

The average expenditure information derived from the meeting attendees survey will be useful in assisting individual communities in estimating the impact of meeting business. If the number of meeting attendees is known for a community or particular facility, the provincial average expenditure figure per travelling party (or, if appropriate, the specific expenditure figures for Vancouver, Whistler and Victoria as noted above) can be used to estimate total expenditures by meeting attendees. It should be noted however that this expenditure information is for multiple day meetings and does not take into account the effect of day usage of meeting facilities, such as banquets.

10. CONCLUSIONS AND IMPLICATIONS

The information received from meeting attendees indicates that the British Columbia meeting product is positively received. The location and beautiful scenery rank first among the factors liked best about British Columbia with meeting facilities and service also leaving a strong positive impression. This indicates potential both for repeat visitation of attendees and strong word-of-mouth advertising by meeting planners.

The estimates of total expenditures by meeting attendees and their travelling party indicates that the meeting industry has a substantial impact on the provincial economy. There is good potential to improve this economic impact through marketing efforts to increase pre and post meeting activity as well as through a general increase in meetings attracted to the province. Opportunities of note are as follows:

- spending during pre and post meeting trips is considerably less than during the convention or meeting itself. Efforts to market pre or post meeting packages might result in larger expenditures, as more extensive soft adventure packages become available in the province and if visitors are encouraged to spend some of the time now spent outside British Columbia, within the province;

- very little is spent on entertainment and recreation, just over two percent and one percent respectively of the average daily expenditure. These categories should be addressed and promoted in marketing information supplied to meeting planners. Even though entertainment and recreation are often included as part of a meeting and not payed for separately by attendees, there is opportunity to increase expenditures in these categories during pre and post meeting trips. In general, regardless of the activity i.e. sightseeing, skiing, etc., offering specific products to meeting visitors might result in increased expenditures in these categories;

- American meeting attendees spend less on average during their visit than Eastern Canadian attendees. This is largely due to lower expenditures on hotels, restaurants and shopping/souvenirs. Increasing the awareness of Eastern American attendees with respect to the facilities and amenities available at their meeting destination may result in increased expenditures; and,

- finally, people who have visited British Columbia for a meeting usually take home a very positive image of the province. These individuals should be targeted by follow-up marketing to encourage return visits.

SECTION E

FUTURE INITIATIVES

1. INTRODUCTION

The intent of this section of the British Columbia Meeting Market Study report is to identify those issues of importance arising from the study research and to propose initiatives to be addressed by both the Ministry of Tourism and the industry in general. Some initiatives refer to a specific action that should be taken whereas other initiatives refer to a change or reassessment of attitude on behalf of the industry and government.

This study was divided into three phases; the Product Inventory and Market Profile Report, the Meeting Planners' Survey and the Meeting Attendees Report. The following analysis combines these three phases, identifying issues pertaining to both product and market development. The ordering of the initiatives does not represent priority.

Prior to presenting the initiatives however, it is first useful to discuss those issues which could influence the environment for product and market development.

2. ISSUES POTENTIALLY IMPACTING MEETING BUSINESS

The potential to attract meeting business or for the development of new facilities may be impacted by a number of issues. The more salient issues are as follows:

- Goods and Services Tax (GST) - The impact the GST will have on the tourism industry is, as yet, unknown although some industry professional suggest that the GST will have a negative impact on the tourism industry, particularly in attracting business from out-of-country. This factor may have a significant impact on British Columbia's ability to increase its market share of meeting demand from the United States market;

- Economy - Meetings are often a discretionary cost for organizations and associations. As such, they are often the first item to be cut or downsized when the economy weakens. Therefore if the economy does experience a downturn, planners from outside British Columbia may be less likely to hold meetings in British Columbia and may choose a location closer to home.

  Changes to the economy also have significant impact on the rate of development of new facilities and the maintenance, upgrading or decline of existing facilities. As the meeting product ages without refurbishment or additions, so too does its ability to attract new business;

- Land Values - Changes in land values have implications for the development of new meeting facilities and ancillary activities such as attractions. Vancouver, in particular, has been affected by high land values. The development of new facilities becomes a longer term investment of little appeal or, alternatively, developments other than tourism product are the highest and best use for sites;

- Competitive Development Outside British Columbia - British Columbia meeting facilities are in competition with facilities outside the province for meeting demand, particularly for out-of-province business. The industry must be aware of the changes to competitive supply. It is however, the major urban centres such as Vancouver, Toronto and Montreal that compete for meeting business because smaller centres attract most of their meeting business from local and regional groups;

- Government Policies - Changes to government policy both within and outside the province can significantly impact meeting demand. A good example of this is the GST mentioned previously. The industry must be aware of changes to government policy and work as a cohesive group in order to make effective representation.

  The industry must also be aware of changes to government policy in the United States. For example, the United States at one time had a policy eliminating the tax deductible status of conventions held outside the United States. This policy negatively impacted the ability of Canada, to attract meeting business from the United States.

3. PRODUCT AND MARKET DEVELOPMENT

3.1 Create a strategy plan for the meeting industry on a provincial, regional and community basis.

To successfully capture meeting demand or increase market share, it is imperative that the Ministry of Tourism, working with industry, assess the potential various locations and facilities have to attract different types and sizes of meetings. This assessment will form the basis of a strategy plan for the meeting industry. As the first step in this regard, a detailed inventory of the meeting product available in various areas (discussed further in 3.3) has partially been created by means of the Product Inventory information compiled as part of this study. (This information will be combined with existing information by the Meetings and Incentive Travel Department to create the most up-to-date inventory available.)

The second step is to develop a short-term marketing plan focusing on those meetings offering the best potential given the current meeting product available in a community. For example, if a community has a large supply of budget accommodation and a large multi-purpose building, it may be ideally suited to cater to large, budget conscious organizations. Over the short-term, immediate product issues such as the need to refurbish facilities, better signage, etc. should also be addressed.

The third step is to create a plan of action to address long range product and market development issues, which will vary from community to community. The two key issues pertain to future markets that may offer potential and new product to be developed.

3.2 Create a cohesive working relationship amongst all elements of the meeting product.

Communities and representatives of individual meeting facilities must be aware of and work with all elements of the meeting product, which include the accommodation, attractions, activities, transportation and other amenities and services that are offered in the community to meeting planners. To successfully attract meeting demand, issues relative to the meeting product such as the need for upgrading of facilities, pricing, new product development, etc. must be addressed. A framework should be established whereby issues pertaining to the meeting product are assessed on an ongoing basis. Those areas in which the meeting product is deficient can then be addressed on a community, regional or provincial basis i.e. guest and meeting room supply is of a poor quality, local attractions are not being promoted and developed, access is poor, etc. The Ministry of Tourism could act in a coordinating role in this regard, assisting the community and/or region in assessing their meeting product and addressing those issues that must be dealt with on a provincial basis such as transportation and access.

Access, in particular, is a primary concern for meeting planners. Therefore the transportation infrastructure in/out of communities and to/from facilities is one element of the meeting product that must be addressed on an ongoing basis. Issues concerning capacity at the airport or highway access need to be dealt with if a community expects to attract significant out-of-town meeting demand.

3.3 Address the necessity for a consistent, up-to-date inventory of meeting facilities.

To effectively market the province as a meeting destination, and to supply industry with current information regarding the British Columbia meeting product, it is necessary to have an up-to-date inventory of the meeting facilities available in the province. To a certain extent, the necessity for current information has already been addressed through information received from the Product Inventory questionnaire. However, it is critical that the inventory be as complete and up-to-date as possible therefore it is essential that any gaps in information be addressed and that the inventory be updated on a regular basis.

Up-to-date product information is the one of the best marketing tools. However, to continuously have this information available however, requires a concerted effort on behalf of the industry to update the Meetings and Incentive Travel Department of the Ministry of Tourism regarding new meeting facilities or additions to existing meeting facilities. Since planners are concerned with more than facility capacity when choosing a meeting site, it is best to present the most detailed information available about a meeting facility and ancillary amenities in a community, information that was gathered by means of the Product Inventory questionnaire.

It would be beneficial for the Meetings and Incentive Travel Department to make this information available in a published form, similar to the Convention and Meetings Guide, categorized by community and noting important area demand generators and entertainment venues such as local attractions as well as the number and capacity of meeting rooms. The information in this publication could also be made available on computer disk.

3.4 Address the potential for new product development.

There are positive implications evident for product development in major cities such as Vancouver and Victoria. Due to their superior inbound access in relation to other British Columbia destinations, these two cities have the greatest potential to benefit from an increase in meeting demand from non-provincial meeting business. As demand for meeting space increases, provincial association and corporate meeting business may choose to hold meetings elsewhere in the province, specifically in those communities surrounding or in close proximity to Vancouver and Victoria.

Substantial population growth in Greater Vancouver (Richmond, Surrey and Coquitlam) and a trend towards relocation of companies to outlying communities also indicates a positive environment for development of new meeting facilities in the area. Meeting business created by growth in local markets may not necessarily be overnight meeting business. As local markets grow, so does the demand for single day usage, i.e. banquets, luncheons, etc.

From a demand perspective, potential for the development of new meeting facilities in certain markets exists. However it must be noted that the decision to build new meeting facilities should be based on much more information than can be gathered from this study. Issues such as development costs, demand for ancillary facilities (i.e. hotel rooms if meeting facility is part of a hotel development), state of the economy, etc. would also need to be addressed.

3.5 Address the necessity for upgrading existing meeting facilities.

To remain competitive, it is necessary for meeting facilities to be upgraded on a continual basis. Accommodation properties tend to upgrade guest rooms before meeting facilities since they are usually the primary revenue generator. However to retain or increase market share, meeting facilities must also be upgraded, particularly if new, competitive facilities are entering the market.

Furthermore, marketing of the meeting facilities or the meeting product in general should reflect any upgrading that has taken place. Management of the meeting facility should inform those organizations marketing on behalf of the community of upgrading, such as regional tourism associations and the Ministry of Tourism.

3.6 Address the market potential of the resort meeting product.

Although resorts are usually less accessible than urban locations, it is the remoteness of their location that is often their primary feature for attracting meeting business. Access may be less of an issue for a meeting planner given the appeal of a particular resort. Pannell Kerr Forster research indicates that the smaller, retreat type meeting has become a growing market in North America, indicating potential to increase meeting business at existing resorts in the province. Marketing resorts separately is, however, costly thus resorts affiliated with internationally and nationally recognized chains will likely realize results most easily. Independently operated resorts would benefit from cooperative advertising and promotion to attract this business, significantly reducing individual marketing costs.

3.7 Encourage the development of a uniform system of recording data regarding the meeting market that can be used by any facility.

The low response to the Market Profile questionnaire indicates that meeting facilities do not keep reliable records regarding their meeting market or do not keep the information in the form or detail requested. Although some major hotel companies keep data according to their own system, the industry in general would benefit from developing a uniform system of recording information, on an individual property basis, pertaining to the meeting market. It is envisioned that this system, similar to the internationally utilized Uniform System of Accounts for Hotels, would provide a reference to meeting facilities setting up or revising their systems on how to record data regarding meeting business consistent with industry standards. In future then it would be possible to obtain comparable information on a community, regional or provincial basis on the status of the meeting market. Confidentiality can be maintained if information is aggregated by an independent third party.

3.8 Address the necessity for projected information on meeting business.

This initiative has three components, as follows:

3.8.1 To more efficiently and effectively market meeting facilities to potential meeting planners, it would be beneficial to have knowledge of the rotation schedule of meeting bookings. For example, if a Western Canadian association rotates meetings between provinces on an annual basis, it would be helpful to know when British Columbia will next have the opportunity to host a meeting. Marketing to this association can then be employed at the most effective time.

The coordination of retrieving and disseminating this information would need to be addressed by the Meetings and Incentive Travel Department of the Ministry of Tourism.

3.8.2 It would be beneficial if future convention and meeting bookings for a community were made available in published form. This would alert the local tourism industry to opportunities with upcoming meetings and educate the community in general with regard to the impact of the meeting industry.

3.8.3 Following from the previous point, local and regional tourism marketing groups would also find it useful to know the number of guest room bookings expected from upcoming meetings. This would be of assistance in deciding whether or how to adjust the marketing plan on a short-term basis. For example, if it were known that most guest rooms in a community were pre-booked over a specific period for upcoming conventions and meetings it would affect the short-term marketing plans at the local community level.

3.9 Target meeting business from outside Western Canada.

The greatest potential for increasing the size of the meeting and convention market lies with planners from outside Western Canada.

Marketing activities should target repeat business from outside Western Canada and attract new organizations to British Columbia for the first time. The American market, in particular, holds good potential due to the vast size of the market in comparison to that of Canada.

3.10 Market Vancouver and Victoria throughout Canada and the United States.

There is a good potential to increase meeting business for Vancouver and Victoria. They are both popular locations with meeting planners. Vancouver and, to a lesser extent, Victoria are well known to planners throughout North America.

Due to the insufficient number of airline routes serving Vancouver from many American cities, efforts should not be concentrated on very large meetings which require large numbers of attendees to arrive at the same time. It should be kept in mind however that some organizers of many large meetings perceive greater access problem in reaching Vancouver and Victoria than actually exists.

3.11 Emphasize factual information about Vancouver and Victoria.

The message relayed to Western American meeting planners does not need to emphasize name recognition or basic awareness. These individuals already know that Vancouver and, to a lesser extent, Victoria exist and they have a positive image of these locations.

While both Canadian and American meeting planners rate Vancouver very high on their list of preferred Canadian locations, only the Canadian planners are familiar with the City's facilities and tourist attractions. Eastern American planners, in particular, have very little familiarity with what the City has to offer. This is also evident when planners are asked about cities other than Vancouver.

Marketing should emphasize hard data about facilities and tourist activities. Planners are already interested in Vancouver and Victoria. They now need to be convinced that these cities are capable of handling their needs.

There are plans, either rumoured or proposed, for the addition of 2,000 new hotel rooms in the Lower Mainland in three separate luxury hotel developments. With recent hotel developments and renovations, as well as the opening of the Victoria Conference Centre, Victoria now has an adequate supply of luxury hotel rooms and good quality meeting space to support the meeting market. This information should be communicated to meeting planners. Many planners said they are pleased with the image of these locations, however they require more factual information.

3.12 Market other British Columbia locations primarily in the Pacific Northwest.

Awareness of smaller British Columbia locations other than Victoria and Vancouver is greater among Western Canadian planners, and accessibility is less of an issue. Marketing to planners from more distant locations would have to achieve name recognition in addition to transmitting detailed information about a given location.

Marketing of the smaller centres (other than resorts) by local and regional tourism associations and the provincial government should not be directed to Eastern American planners due to greater difficulty in accessing these sites. Marketing of the smaller British Columbia meeting locations should focus more on Canadian planners, especially those in the west, and planners in the state of Washington. It is unlikely that marketing directed more broadly than this will be effective because these locations tend to attract smaller meetings whose attendees do not typically travel far from home. An exception would be for luxury class destination resorts which can compete effectively for smaller corporate meetings from Eastern Canada and the United States.

3.13 Consider the use of videotapes as a form of direct mail marketing.

3.13.1 Meeting planners agree that the best way to receive information about a site is by direct mail. The task of the direct mail marketer is to ensure that the information is read. Most planners say that they receive a large amount of mail and, unless they have a specific reason to read a particular piece of mail, it is thrown away.

To ensure that direct mail is a beneficial form of advertising, it is recommended that videotapes be developed. The use of videotapes as a marketing tool received a positive response from meeting planners. Planners want to know, for example, how many airline seats arrive in Vancouver in a day, how many rooms can be set aside for a meeting in the hotels, how many break out rooms there are, how large the banquet facility is, and so on. This data can be accompanied on a videotape by visual representations of the facilities being discussed. While the production of a videotape would be expensive, due to its uniqueness, it would ensure that a greater audience would be reached than through the use of other types of marketing. An information sheet or computer disk containing factual information should accompany the videotapes. This can then be used as a quick reference by planners.

3.13.2 The Ministry of Tourism, regional and local tourism and convention marketing associations, and the industry in general should work together, in a cooperative marketing effort, to create these videos.

The subject of the videos will vary depending on the origin and type of meeting to be targeted. For example, videos could be prepared that focus on major cities such as Vancouver and Victoria, resort meeting destinations or meeting destinations in a particular region, such as the Okanagan-Similkameen.

3.14 Target Western Canadian planners for repeat business.

An increase in meeting business from British Columbia and Alberta will come primarily from companies and associations which are already holding some of their meetings in the province. Marketing should therefore be directed at encouraging repeat business, rather than finding entirely new organizations based in Western Canada to hold meetings here.

3.15 Increase marketing of pre and post meeting activity.

Given the importance of pre and post convention trips and of selling spousal activities to meeting attendees, marketing should stress the presence of tourist activities, entertainment and unique shopping. It should be kept in mind that the major concern of the meeting planner is to choose a location that will be attractive to members (especially in the case of voluntary attendance). Creating an awareness of the amenities available in an area, such as attractions, then becomes particularly important.

3.16 Recognize the relationship between the meeting planner and meeting attendee in the decision making process related to selecting a meeting site and utilize this knowledge in the development of marketing.

This initiative refers to an incorporation of attitude rather than action. The criteria for choosing a meeting site will vary depending on the type of meeting i.e. whether attendance is voluntary or compulsory.

A dynamic relationship exists between the meeting planner and the meeting attendee in the choice of a meeting site. If attendance at the meeting is voluntary (as often as with an association meeting), the meeting planner must "sell" potential meeting attendees on the site, which requires being convinced personally as a prerequisite. The planner requires a location that will draw attendees. Often the acceptability of the location to spouses affects the attendance levels. Forty-five percent of all meeting attendees get their information about a specific area from the meeting planner indicating that, to maximize attendance at these meetings, planners should be supplied with information about the site, local amenities and pre and post meeting activities to be distributed to potential attendees.

If a meeting has compulsory attendance, i.e. a meeting of all sales managers for a company, a planner's criteria for choosing a site may change. Although location may still be a primary concern, the planner may be more inclined to choose a site unknown by meeting attendees, such as a resort location where attendees can be confined to a specific area.

Determining the motivating factors behind a planners choice of a meeting site and recognizing the demands that must be satisfied will indicate ways in which the site can be more effectively marketed or the types of meetings which represent the best potential.

3.17 Coordinate marketing between all levels of industry and government.

To most effectively and efficiently market the province as a meeting destination, industry and government must cooperate in targeting specific markets and presenting information. A coordinated marketing plan (as discussed in 3.1) is needed for presenting the province as a meeting destination. This would ensure that contradictory messages are not supplied to meeting planners. It would also create a more efficient approach to marketing. For example, if more than one facility or region is attending a trade show the cost involved could be shared.

3.18 Investigate the possibility of simplifying the customs clearance process for meeting planners.

In the course of the research for this study, some American meeting planners noted that the anticipated difficulty of going through Canada Customs is a deterrent to holding a meeting here. This was noted particularly by those planners planning a trade show where a large amount of materials must pass through customs. The possibility for simplifying the customs clearance process for meeting planners should be addressed by the Ministry of Tourism and any resulting change in the process should be communicated to planners.

TOURISM

BRITISH COLUMBIA MEETING MARKET STUDY

ECONOMIC & REGIONAL DEVELOPMENT AGREEMENT

Canada

BC

BRITISH COLUMBIA MEETING MARKET STUDY

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Industrie, Sciences et Technologie Canada

Province of British Columbia
Ministry of Tourism

Ministry of Regional and Economic Development

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SECTION A

INTRODUCTION

1. STUDY PURPOSE

British Columbia has received increasing national and international exposure in recent years due to the economic ties the province has forged in the Pacific Rim and the hosting of Expo '86 in Vancouver. As a result, British Columbia's appeal has grown, particularly in the areas of tourism and related industries. A determination now exists in this province to capitalize on the opportunities this exposure and appeal has given us. The task currently facing the province is to sustain and develop initiatives which have emerged from the province's growing recognition.

One of the areas which has shown promising growth in recent years is the "meeting market". This term refers to the meetings, conferences, conventions and trade shows which are held in meeting facilities throughout the province. These facilities include conference centres, trade and convention centres, hotels, resorts and a range of public buildings, such as arenas, halls and multiplex buildings, whose primary market may not be meetings but are, nevertheless, used to service this market.

The meeting industry is a very lucrative market, making a significant financial contribution to the provincial economy particularly in larger meeting centres, such as Vancouver and Victoria. Spending by meeting attendees is generally much higher than that of the leisure visitor. Many attendees also extend their stay in a meeting location, adding more financial benefit to the local economy and the province in general.

Prior to the construction of a large convention centre over the past five years in each of Vancouver, Victoria and Whistler, the province catered primarily to small and medium size meetings. With the advent of these facilities, as well as the recent renovation and addition to the Penticton Trade and Convention Centre (doubling its floor space), the province is better equipped to cater to large size meetings.

To date, little information specific to British Columbia had been collected about the potential of the meeting market, particularly the larger meetings that attract over 100 attendees. The purpose of this study was to inventory the British Columbia meeting product and determine and identify demand sources within Canada and the United States which have the greatest potential of travelling to British Columbia for meetings and which, therefore, represent the best market opportunities for the British Columbia meeting product.

To serve this purpose, the following objectives were developed:

- create an inventory of the British Columbia meeting product, to include information on capacity and services available;
- compile a profile of present meeting attendees;
- compile a breakdown of meeting attendee spending;
- assess the economic impact of the meeting market;
- conduct further analysis of Visitor '87 data;
- estimate British Columbia's share of the meeting market;
- measure meeting planners' awareness of British Columbia locations and facilities;
- measure meeting planners' image of British Columbia;
- discover how meeting planners get information about meeting sites;
- determine characteristics of the largest meeting planned this year;
- investigate the decision process which leads to the selection of meeting sites; and,
- discover and assess the importance of any barriers to the user of British Columbia sites.

This information will assist both government and industry in identifying potential opportunities in the meeting market and how best to exploit these opportunities. It will also give a thorough understanding of the current inventory of meeting facilities in British Columbia.

2. OVERVIEW OF APPROACH

The Meeting Market Study was conducted over a 15 month period from October 1988 to December 1989. It focused on three subjects essential to understanding the status and future potential of the meeting market: current British Columbia meeting facilities; meeting attendees; and, meeting planners. Consequently the approach to the study consisted of three distinct and overlapping phases. The methodology for each of these components is discussed in more detail in each of their respective chapters. The following gives an overview of the approach taken with regard to the three subjects:

Current Facilities

This section of the study consisted of two parts: a review of existing materials which provide information concerning meeting facility inventories; profiles of users and other relevant data; and, a survey of operators of facilities with a capacity for 100 meeting attendees or more. Product Inventory and Market Profile questionnaires were developed and forwarded to management at these facilities with the intent of creating an inventory of the British Columbia meeting product, identifying quality, size, markets, volumes of business and range of services.

Meeting Attendees

From December 1988 to December 1989, a sample of meetings held in British Columbia was selected for distribution of surveys to meeting attendees. The sampling of meetings concentrated on the total meeting market including both locally generated meetings as well as the destination meeting market. A meeting was defined as any gathering which is attended by non-local people who stay in a hotel in order to attend.

During the registration of each meeting sampled, a representative first screened attendees, to make sure the criteria of staying overnight, away from home, was met. Diaries were then distributed to the attendees. The diaries were used to maintain a record of attendees' activities and expenditures during their visit, including shoulder activities. These diaries were then mailed back to us at the end of the attendees' stay.

Meeting Planners

Meeting planners were approached in two ways. Firstly, focus groups were conducted with 61 meeting planners in Seattle, Los Angeles, Chicago, Washington, D.C., Toronto and Ottawa. The focus groups were comprised of corporate and association internal planners and key decision makers and professional meeting planners. The intent of the focus groups was to discuss the image and knowledge meeting planners have of British Columbia, to investigate their process for planning meetings and to discuss the best method of communicating information to them.

Secondly, after the focus groups were completed, a telephone survey was conducted with approximately 600 meeting planners across North America. The design of the questionnaire followed directly from the questionnaire used form, and issues which emerged from, the focus group discussions. The intent of the survey was to address issues such as the characteristics of the planners' largest meeting, the decision making process for planning a meeting, how British Columbia locations are perceived and how information is obtained. In addition, descriptive characteristics of the organization itself were also obtained (size, type of business/association, etc.).

Along with the collection of hard data on the meeting market, the intent throughout the study was also to develop marketing recommendations and initiatives for the Ministry of Tourism (Ministry) and the meetings industry in general. These are presented in Section E, Future Initiatives.

SECTION B

PRODUCT INVENTORY AND MARKET PROFILE REPORT

1. INTRODUCTION

The ability to market British Columbia successfully as a meeting destination is dependent upon both the Ministry and industry having access to up-to-date information regarding all meeting facilities available in the province. Meeting planners want to know exactly what they can expect of a destination, in terms of the meeting facility itself and surrounding activities.

This component of the Meeting Market study was concerned with gaining a thorough knowledge of the meeting facilities available in the province by providing a comprehensive facility inventory, indicating quality, size, meetings currently serviced and the range of services meeting facilities can offer.

Coupled with the information collected from meeting planners and attendees in other phases of this study, this information also indicates the potential for future product development.

2. OBJECTIVES

The specific objectives of the Product Inventory and Market Profile section of this study were as follows:

- to create an inventory of the British Columbia meeting product to include all facilities capable of handling 100 or more attendees;
- to determine capacities and services available for each facility; and,
- to provide information about the groups each facility presently serves and the number of meetings and attendees serviced on an annual basis.

The intent of the first two objectives is to create a data base containing up-to-date, accurate and comprehensive information regarding available meeting facilities which can be used by meeting planners and the industry in general. The aim was to gather as much information as possible about the meeting product, including information regarding activities and available amenities as well as number of meeting rooms and capacities.

The intent of the third objective is to identify the volume and origin of meetings of over 100 attendees held in the province, on an annual basis.

3. METHODOLOGY

Two questionnaires were developed to compile product and market information from meeting facilities throughout the province (copies of both questionnaires are included in the Appendix to this report). The Product Inventory questionnaire focused on the following three areas:

- capacity and inventory of meeting rooms per facility;
- guest accommodation and room amenities, if available, at the facility; and,
- guest services available at or near the facility, i.e. in-house dining rooms, business related services, recreational facilities and attractions in close proximity.

The Market Profile questionnaire was designed to obtain information regarding meeting groups of over 100 attendees booked during 1988. The purpose was to gauge the type and volume of meetings currently held in British Columbia. This information was categorized as follows:

- type of organization i.e. corporations, associations, etc.;
- size of meeting groups;
- organization's scope of responsibility i.e. local, provincial, international, etc.;
- purpose of meeting i.e. board meeting, convention/conference, etc.;
- origin of business (location of headquarters); and,
- origin of meeting attendees.

Additional requested information pertained to average group expenditure for food and beverage functions, average length of stay of meeting groups of over 100 attendees and the average number of room nights booked by meeting groups.

In January 1989, the Product Inventory and Market Profile questionnaires were sent to all facilities in the province able to cater to meetings of over 100 attendees. The basis of the inventory consisted of those facilities listed in the Ministry of Tourism, Convention and Meetings Guide with a meeting room capable of holding at least 100 people in either theatre, banquet or reception style. The inventory was then supplemented with information from other sources. The Ministry of Tourism "Ski With Us" magazine was consulted for a listing of ski resorts with meeting facilities. As well, regional tourism associations and convention bureaux were contacted and asked to supply the names of facilities capable of handling groups of over 100 if any were not included in the Ministry of Tourism, Convention and Meetings Guide; questionnaires were then sent to management at those facilities. The total mailing list included approximately 300 properties. To ensure that the information collected was as comprehensive as possible, there were two subsequent questionnaire mailings in March and July of 1989 to those properties who had not responded to previous mailings.

The response to the Product Inventory questionnaire was much higher than that of the Market Profile questionnaire. There were 143 responses to the Product Inventory questionnaire and 56 responses to the Market Profile questionnaire. Of the Market Profile questionnaires that were completed, not all were completed fully. Many of the facilities commented that they were unable to complete the Market Profile questionnaire because they either did not keep the information requested or it was not easily accessible (aside from the 56 completed Market Profile questionnaires, there were 46 questionnaires that were sent back empty). However, many facilities recognized that the information would be useful and therefore the property management would, in future, keep more detailed records.

4. PRODUCT OVERVIEW

Meeting Facilities

Prior to the construction of large conference facilities in Vancouver, Victoria and Whistler over the past five years, the province primarily serviced the small to medium size meetings market arising from associations and businesses based in British Columbia. These meetings were mainly serviced using existing hotel meeting facilities. However, with the construction of the larger capacity conference facilities, as well as the recent expansion and renovation of the Penticton Trade and Convention Centre, formerly known as the Penticton Peach Bowl, British Columbia is increasingly able to attract large national and international meeting groups. With this potential in mind, it has become necessary to have access to a complete inventory of meeting facilities capable of handling groups of 100 people or more, including information on other elements of the meeting product such as the availability of guest rooms and amenities.

Traditionally meeting facilities have been developed as part of full facility hotels (full facility defined as having rooms, food and beverage outlets and meeting space) in either an urban or resort location. Resort hotels tend to cater to smaller, retreat type meetings in comparison to hotel meeting facilities in urban locations.

In many communities, public facilities such as an arena, recreation complex or a college campus are used to hold large meetings or possibly a component of a meeting that cannot be held in a hotel. Since public facilities are usually designed for multi-purpose use, their utility and desirability as meeting space is generally less than that of a hotel or conference centre.

A relatively new entry into the meeting facility market in British Columbia has been the convention/conference centre although the first freestanding convention centre in Canada, the Penticton Trade and Convention Centre, was built in 1965. Convention/conference centres are developed in major cities or resort destinations with the intent of catering to large meeting groups. There have been three conference centres built within the last five years in Vancouver, Victoria and Whistler, a major resort destination.

Other Elements of the Meeting Product

When choosing a meeting destination, planners are concerned with issues such as availability of guest rooms, access and activities available in the vicinity. Therefore guest room supply, attractions, recreational activities and transportation access all must be considered as part of the meeting product and must be addressed by communities and meeting facilities when marketing to meeting planners.

Meeting groups require an adequate supply of guest rooms to accommodate meeting attendees. Depending on the size of the meeting, hotels with meeting space are generally able to supply the necessary rooms from their own inventory, although they may also have to draw from other accommodation in the local market. Convention Centres, however, rely completely on the local accommodation base to supply guest rooms.

Resorts are often chosen as a meeting destination because of the activities or amenities associated with their location or facility, such as fishing, skiing, etc. These meetings though tend to be smaller in size because, in comparison to an urban location, resorts often must contend with increased travel time and restricted accessibility, making it difficult to accommodate large groups of people. Resorts are particularly attractive for retreat type meetings which have become increasingly popular all across North America. These meetings are often held at resorts because of the seclusion a resort can usually offer.

There are, however, a few constraining factors that meeting planners may have to contend with when considering a resort as a meeting destination. Since most resorts are secluded and typically remote from other accommodation properties, their guest room supply has to be adequate to accommodate all meeting attendees. Also, ease of transportation for meeting groups is a key issue for planners and one that resorts must address to successfully capture meeting demand. Conversely, a resorts seclusion may, in fact, be its most positive feature in attracting meeting because planners often like to have delegates in a captive location.

5. TRENDS IN SUPPLY

Depending on their location and type, meeting facilities will attract varying degrees of association and corporate meeting business from the local market or further afield. Traditionally, most of the larger British Columbia based associations and businesses chose Vancouver as their meeting site because of the quality and size of meeting facilities, ease of transportation and for convenience. With the opening of the Vancouver Trade and Convention Centre in 1987 and the increased national and international exposure Vancouver has received as a destination for visitors, Vancouver now attracts more meeting business from outside the province. As competition for meeting space in Vancouver becomes more intense, British Columbia based associations and businesses may be forced to seek other meeting sites, possibly in the communities surrounding Vancouver, i.e. Richmond, Burnaby, etc., or elsewhere in British Columbia.

Growth in volume of meeting facilities, particularly in urban settings, usually follows local economic and population growth. From the time of the recession in the early 1980's, few full facility hotels have been built in British Columbia and therefore the supply of meeting space from this source has increased little. However, interest in hotel development, particularly in Vancouver, Victoria and Whistler increased in the latter part of the 1980's largely due to an improvement in their local economies.

Victoria

During 1989 in Victoria, the Hotel Grand Pacific opened, the Empress Hotel completed its extensive renovations and the Laurel Point Inn added to its guest room complement. Victoria now has an adequate supply of better quality hotel rooms to offer meeting attendees. The opening of the Victoria Conference Centre in 1989 also created a supply of high quality meeting space for the city. At the time of report writing, there were another five hotel developments proposed or rumoured for Victoria that would add new meeting space and guest rooms to the marketplace.

Whistler

Whistler, with its guest room base and the Whistler Conference Centre, has a good supply of quality facilities to cater to large meetings. Extensive meeting space was added to the Whistler marketplace with the opening of the Chateau Whistler Resort in 1989. With 343 rooms, it is the largest resort hotel to be built in Canada since the turn of the century. There are also plans for an addition of 200 rooms to the hotel in the future. The advent of the new Chateau Whistler Resort and the proposed development of the Bjorn Borg Resort at Whistler will enhance the potential for Whistler to attract meeting business.

Vancouver

At the time of report writing, there are plans, either rumoured or proposed, for the addition of approximately 2,000 new hotel rooms in the Lower Mainland market in three separate luxury quality hotel developments. These developments will add to the supply of meeting space and luxury hotel rooms currently available.

(Some of the meeting planners who participated in the focus group sessions in this study commented that they feel Vancouver does not have enough luxury level hotel rooms. Therefore the new room supply, if of the quality proposed, will serve to alleviate this concern.)

The quality of hotel guest rooms in Vancouver is generally comparable to or better than that of hotels in other major North American cities. This is, in part, due to the extensive upgrading and renovations of existing physical plant that took place prior to Expo '86. To a lesser extent, hotel meeting rooms were also upgraded at the same time. In general though, meeting rooms in Vancouver at the better quality hotels have been well maintained.

Other British Columbia

As per Pannell Kerr Forster research, guest rooms and meeting rooms in older hotel properties have not been subject to a regular renovation programme in many British Columbia communities and many are in need of redesign and refurbishment. Many older meeting rooms also suffer from design constraints such as poor room layout to facilitate a meeting. Some rooms, for example, have poor ventilation systems or posts in the middle of a room that decrease visibility.

Interest in hotel development has been evident outside of the major centres of Vancouver and Victoria. Depending on the type of hotel, meeting space may or may not be included. For example, a major lakeside hotel and conference facility development is proposed in Kelowna that would allow the city to cater to meeting groups in the 1,000 person range. There are other full facility resort and community hotels proposed in Kelowna and Kamloops at this time as well.

6. PRODUCT INVENTORY

To analyze meeting facilities in British Columbia, an inventory was created based on the most current information available from the Ministry of Tourism (the Convention and Meetings Guide updated to January

1990) and supplemented with information compiled from the Product Inventory questionnaire. This inventory represents all meeting facilities available in British Columbia that can accommodate groups of 100 or more people. Although the Product Inventory questionnaire mailing was a census of meeting facilities in the province capable of handling groups of 100 people, approximately 50 percent of the facilities did not mail back the questionnaire. Consequently, basing an analysis of the British Columbia meeting product inventory solely on the results of the Product Inventory questionnaire would have been constraining.

Information for the Provincial Overview and Regional Summary of British Columbia meeting facilities was tabulated according to major city, tourism region and province. The tabulations only included those properties able to handle at least 100 attendees in either theatre, banquet or reception format.

The meeting facilities have been grouped in three categories: accommodation properties with meeting facilities (includes hotels, motels, motor inns and resorts); convention/conference centres which are run strictly as meeting facilities; and, public facilities such as stadiums, arenas, halls, multiplex buildings and colleges that can be used for meetings but where the use of the facility as a meeting venue may be secondary to its primary purpose. The vast majority of meeting facilities available in British Columbia fall into the first category, accommodation properties with meeting space.

The following provincial and regional analysis pertains only to those meeting facilities able to accommodate meeting groups of 100 people. For example, where the number of guest or meeting rooms is provided for a region, it is based only on those properties that have a meeting room capacity of over 100 people. In actuality, the guest room or meeting room count for an area may be higher if accommodation properties without meeting rooms, such as motels, or those with meeting capacities of less than 100 people were added in.

Provincial Overview

TABLE B-1

PROVINCIAL TOTAL

	TOTAL NUMBER OF			LARGEST * THEATRE CAPACITY			LARGEST * BANQUET CAPACITY			LARGEST * RECEPTION CAPACITY			MEETING FACILITY BREAKDOWN		
CITY	MEET. FACIL.	MEET. ROOMS	GUEST ROOMS	HOTELS	PUBLIC FACIL.	CONV. CENTRE	HOTELS	PUBLIC FACIL.	CONV. CENTRE	HOTELS	PUBLIC FACIL.	CONV. CENTRE	HOTELS	PUBLIC FACIL.	CO CE
A: Vancouver Island	74	812	4,590	600	3,500	1,800	550	2,000	1,000	700	5,000	1,800	54	19	
B: Southwestern B.C.	78	762	12,503	1,650	3,500	11,070	1,300	1,000	7,940	1,500	1,200	1,800	66	10	
C: Okanagan/Similk.	25	104	2,153	700	1,100	443	650	700	2,200	700	1,070	1,800	22	2	
D: Kootenay Country	16	50	523	300	1,200		350	1,200		400	1,200		11	5	
E: High Country	23	62	1,079	500	4,000		350	3,000		550	3,000		16	7	
F: Cariboo	12	28	388	500	1,200		400	900		500	900		7	5	
G: North by Northwest	31	96	1,597	0	3,000		470	1,500		600	1,400		20	11	
H: Peace Riv/Alaska Hwy	7	17	333	500	425		400	425		500	425		4	3	
I: Rocky Mountain	21	68	1,357	450	2,500		500	2,200		500	2,200		12	9	
TOTAL	287	1,999	24,523										212	71	

* Represents largest capacity at a single facility

There are 287 facilities in the province that can handle meetings of 100 attendees or more. Of these facilities, 212 are part of an accommodation property, 71 are public facilities and four are convention/conference centres. Vancouver Island and Southwestern British Columbia tourism regions contain 79 percent of the provincial total of meeting rooms in accommodation properties, convention/conference centres and public facilities, able to accommodate groups of 100 people. Vancouver and Victoria, in particular, have 27 percent of the provincial total of meeting rooms located in accommodation properties. The quality of meeting facilities in the province varies considerably depending on location, type of meeting facility and existence of a regular renovation programme.

Public Facilities

Public facilities used for meeting space tend to be lower cost, multi-function, buildings with their primary focus being to service the local community. Because they are often multi-function buildings, they tend to be less attractive and less functional as meeting space than single purpose meeting space found in accommodation properties or convention centres. The primary market for public facility meeting space is comprised of price sensitive local or regional demand sources looking for large meeting space. The facilities may also be used to accommodate a segment of a meeting where a large space is needed, such as a trade show. Most communities have some sort of public facility that can be used as meeting space, such as a recreation centre or town hall.

Conference/Trade and Convention Centres

There are four conference/trade and convention centres in the province: the Vancouver Trade and Convention Centre, the Victoria Conference Centre, the Whistler Conference Centre and the Penticton Trade and Convention Centre. They are all high quality facilities largely due to the fact that they are either fairly new or, as in the case of the Penticton Trade and Convention Centre, have undergone recent renovation. All four convention/conference centres are able to attract and accommodate large meetings. The origin of their meeting business varies depending on their location. Due to ease of access for meeting attendees, a larger proportion of the meeting business at the Vancouver Trade and Convention Centre will be from out-of-province and outside the Pacific Northwest. The convention/conference centres generally offer the largest capacities of all meeting facilities.

Accommodation Properties

The vast majority of meeting space is found in accommodation properties: hotels, motor inns, motels and resorts. The quality level varies significantly between properties. As with guest rooms, meeting space needs regular upgrading and refurbishing to remain appealing. In very general terms, the quality of meeting space at an accommodation property will tend to follow the quality level of its guest rooms, i.e. a luxury level hotel will have luxury level meeting rooms and a budget hotel will have budget level meeting space. Since Vancouver and Victoria have more luxury hotels than other cities in the province, they tend to have the majority of better quality meeting rooms. However since guest rooms and meeting space are not always upgraded at the same time, it is possible that a property with good quality guest rooms may have poor quality meeting space or vice versa. Since the majority of a hotel's revenue will be earned from guest rooms, in general, they tend to be upgraded more regularly than the meeting space.

Resorts, particularly those located a long distance from a city centre, are more dependent on the quality of their meeting space and guest rooms to attract meeting demand. Unlike an urban centre, where meeting space at a hotel may be chosen largely due to convenience of location, a resort must be attractive enough to compel people to travel to its destination.

The number of guest rooms available in an area, particularly of a similar quality and price level, is an important determining factor in the size of meeting an area can attract and accommodate. A city must have enough guest rooms of the desired quality level to accommodate all meeting attendees.

Following the Southwestern British Columbia and Vancouver Island tourism regions in terms of number of meeting facilities are the North by Northwest and Okanagan-Similkameen regions. Prince George, the largest city in the North by Northwest tourism region, is also the largest meeting centre north of the Okanagan-Similkameen region. There are 31 meeting sites with a capacity to cater to groups of over 100 in the North by Northwest compared to 25 in the Okanagan-Similkameen region.

The region with the fewest meeting facilities capable of accommodating 100 or more people is Peace River/Alaska Highway with 17 meeting rooms in seven properties.

Regional Summary

Vancouver Island

TABLE B-2

REGION A: VANCOUVER ISLAND

CITY	TOTAL NUMBER OF			LARGEST THEATRE CAPACITY			LARGEST BANQUET CAPACITY			LARGEST RECEPTION CAPACITY			MEETING FACILITY BREAKDOWN		
	MEET. FACIL.	MEET. ROOMS	GUEST ROOMS	HOTELS	PUBLIC FACIL.	CONV. CENTRE	HOTELS	PUBLIC FACIL.	CONV. CENTRE	HOTELS	PUBLIC FACIL.	CONV. CENTRE	HOTELS	PUBLIC FACIL.	CONV. CENTRE
Campbell River	6	18	244	180	800		200	1,000		250	1,280		4	2	
Courtenay	5	17	233	225	450		225	450		225	500		3	2	
Cowichan Bay	1	4	56	200			180			200			1		
Duncan	3	24	162	475	740		380	1,000		450	1,500		2	1	
Gabriola Island	1	1	18	50			80			100			1		
Gold River	1	2	49	125			100			150			1		
Ladysmith	1	2	51	120			100			100			1		
Lake Cowichan	3	6			300			240			240			3	
Nanaimo	7	46	431	550	3,500		425	1,200		500	2,000		4	3	
Nanoose	1	2	50	120			100			170			1		
Parksville	3	14	216	250			180			300			3		
Port Alberni	4	16	189	600	525		500	300		520	400		3	1	
Port Hardy	3	12	196	300			220			300			3		
Port McNeill	1	1	68	100			100			100			1		
Qualicum Beach	4	11	113	200	220		225	220		225	220		2	2	
Sidney	2	20	98	200			160			200			2		
Victoria	28	616	2,416	600	3,500	1,500	550	2,000	1,000	700	5,000	1,800	22	5	1
TOTAL	74	812	4,590										54	19	1

The Vancouver Island tourism region has 74 meeting facilities that can handle groups of over 100 people. These facilities include 54 accommodation properties, 19 public facilities and the Victoria Conference Centre. The majority of these facilities are concentrated in Victoria, the region's largest city. Victoria accounts for 38 percent of the meeting properties, 55 percent of the guest rooms at accommodation properties with meeting facilities and 76 percent of the meeting rooms in the region.

One of the newest meeting facilities in Victoria is the Victoria Conference Centre which opened in January 1989 and can handle groups of 1,000 to 1,500 people depending on set up style. The addition of the Conference Centre has increased the competitiveness of Victoria for large size meetings in comparison to other major Pacific Northwest centres.

With the addition of the Hotel Grand Pacific and new rooms at the Laurel Point Inn, as well as renovations at the Empress Hotel, Victoria can offer an increasing supply of luxury level hotel rooms to large meeting groups. With five hotel developments proposed or rumoured for the Victoria area, this supply is expected to increase in the future, adding to Victoria's attractiveness as a meeting destination.

Nanaimo is second in the Vancouver Island region in terms of the number of available meeting facilities that can accommodate meeting groups of 100 people. There are seven facilities with 46 meeting rooms and 431 guest rooms.

Other meeting facilities in the region are spread throughout the smaller cities. The largest capacity facilities are usually public facilities, such as a local arena or hall. In Campbell River, for example, the Strathcona Gardens Arena can accommodate 1,000 people for a reception.

There are also a number of resorts in the Vancouver Island region that can cater to meeting groups of 100 people. Most of these resorts have a maximum capacity in the 100 to 200 person range. The Bayside Inn in Parksville is expanding its meeting capacity in 1990. The appeal for many of the resorts in this region is their location near the ocean. Many of the resorts can handle a meeting capacity of 100 people although the room supply precludes them from attracting groups of this size. To handle a meeting of 100 people, a resort needs a minimum of 50 rooms (assuming that all attendees share accommodation). The maximum room count of many of the resorts is less than 50 rooms.

TABLE B-3

REGION B: SOUTHWESTERN B.C.

CITY	TOTAL NUMBER OF			LARGEST THEATRE CAPACITY			LARGEST BANQUET CAPACITY			LARGEST RECEPTION CAPACITY			MEETING FACILITY BREAKDOWN		
	MEET. FACIL.	MEET. ROOMS	GUEST ROOMS	HOTELS	PUBLIC FACIL.	CONV. CENTRE	HOTELS	PUBLIC FACIL.	CONV. CENTRE	HOTELS	PUBLIC FACIL.	CONV. CENTRE	HOTELS	PUBLIC FACIL.	CONV. CENTRE
Abbotsford	2	4	147	240			180			220			2		
Burnaby	3	26	478	450			300			450			3		
Chilliwack	3	12	135	400	650		350	500		350	450		2	1	
Clearbrook	1	2	77	40			125			150			1		
Coquitlam	2	11	108	210	250		160	250		300	400		1	1	
Delta	2	10	200	330			250			300			2		
Harrison	1	9	324	850			850			1,000			1		
Manning Park	1	1	68	100			85			112			1		
Maple Ridge	1	4	60	200			170			250			1		
New Westminster	2	12	218	800			450			700			2		
North Vancouver	4	14	265	165			350			400			4		
Port Coquitlam	2	6			360			360			380			2	
Powell River	3	11	116	200	730		240	1,000		220	1,000		2	1	
Richmond	7	69	1,566	800	561		700	80		800	100		6	1	
Squamish	4	24	314	350			250			300			4		
Surrey	2	10	84	400	500		600	500		700	500		1	1	
Vancouver	30	495	7,131	1,650	3,500	11,070	1,300	900	7,840	1,500	1,200		26	3	1
Whistler	8	42	1,212	750		1,800	550		1,080	800		1,200	7		1
TOTAL	78	762	12,503										66	10	2

Meeting facilities in the Southwestern British Columbia tourism region are concentrated in Greater Vancouver (Vancouver and surrounding communities) and Whistler. The majority of meeting facilities are in downtown Vancouver, including the Vancouver Trade and Convention Centre, the largest meeting venue in the province. Greater Vancouver has a large concentration of hotels with meeting capacity of over 500 people. There are 13 hotels in Vancouver, Richmond, Burnaby and New Westminster that have meeting capacities of over 500 people. Seven of these properties are located in the downtown Vancouver area.

The appeal of Vancouver as a meeting destination is the same as that of most other major cities in North America, ease of access and a large number of amenities, such as shopping, attractions, etc. Being the main business and population centre for the province, Vancouver has a large base of corporations and associations from which to draw meeting business.

Many of the surrounding communities of Vancouver, such as Richmond, Coquitlam and Surrey, are experiencing a population boom. This increase in population, coupled with the growing tendency for businesses to locate or relocate outside of the downtown Vancouver core, has put increasing pressure on these communities to supply meeting space simply for day usage, such as luncheons or for community functions such as weddings. From an economic perspective, the development of new meeting space may or may not be feasible, however from a user perspective, the demand for more meeting space is evident. These communities are close enough to Vancouver that they also benefit, in varying degrees, from the ease of access and level of amenities that Vancouver has to offer. Vancouver, excluding surrounding communities, currently accounts for 39 percent of the meeting facilities in the region capable of handling meeting groups of 100 people, 65 percent of the meeting rooms and 59 percent of the guest rooms.

Outside of Greater Vancouver, Whistler has the second largest concentration of meeting rooms and guest rooms in the region, and one of four convention/conference centres in the province. The Whistler Conference Centre can handle capacities of 1,050 to 1,800 people, depending on set up style. The new Chateau Whistler Resort has added significantly to Whistler's ability to cater to large meetings. The Chateau Whistler Resort can accommodate capacities of 400 to 800 people depending on set up style. Although it is a resort destination, Whistler can offer many of the amenities that an urban location can offer, such as shopping and restaurants. However, Whistler is less accessible in comparison to Vancouver or Victoria and meeting groups must contend with competition from tourist demand for hotel rooms in winter months, although Whistler has an advantage in that the strong meeting months fall in the low occupancy period.

Along with the Chateau Whistler Resort, the Harrison Hot Springs Hotel, located in Harrison Hot Springs, is one of the largest resort hotels with substantial meeting space in the province. The Harrison Hot Springs Hotel can accommodate groups of 850 people theatre or banquet style and has 324 guest rooms. Aside from Whistler and Harrison Hot Springs, the resort supply is minimal in Southwestern British Columbia.

Okanagan-Similkameen

TABLE B-4

REGION C: OAKANGAN / SIMILKAMEEN

	TOTAL NUMBER OF			LARGEST THEATRE CAPACITY			LARGEST BANQUET CAPACITY			LARGEST RECEPTION CAPACITY			MEETING FACILITY BREAKDOWN		
CITY	MEET. FACIL.	MEET. ROOMS	GUEST ROOMS	HOTELS	PUBLIC FACIL.	CONV. CENTRE	HOTELS	PUBLIC FACIL.	CONV. CENTRE	HOTELS	PUBLIC FACIL.	CONV. CENTRE	HOTELS	PUBLIC FACIL.	CONV. CENTRE
Enderby	1	1	32	125			125			125			1		
Kelowna	8	43	947	600	500		586			600			7	1	
Oliver	1	3	47	150			100			150			1		
Osoyoos	3	3	122	150			150			200			3		
Penticton	5	24	479	850		443	400		2,200	700		1,800	4		1
Vernon	7	30	526	700	1,100		650	700		700	1,070		6	1	
TOTAL	25	104	2,153										22	2	1

Virtually all meeting facilities in the Okanagan-Similkameen tourism region are located in Kelowna, Vernon and Penticton. Each city has hotel meeting facilities that can accommodate groups in the 600 to 700 range.

The first convention centre in the province, known originally as the Penticton Peach Bowl, was built in Penticton in 1965. It was renamed the Penticton Trade and Convention Centre after completing major renovations and an addition in 1988 which doubled its floor space. In terms of its ability to attract large meetings, Penticton would benefit from having an increase in the number of better quality hotel rooms and hotels with a larger number of rooms to offer meeting attendees. Currently the guest room supply in Penticton is low in comparison to the number of meeting attendees that can be accommodated at the Penticton Trade and Convention Centre. With the Trade and Convention Centre, Penticton has the largest available meeting capacity in the Okanagan-Similkameen region. Penticton however has poorer air accessibility than Kelowna.

Kelowna is able to offer the easiest access in the Okanagan for out-of-town meeting groups because its airport is most frequently serviced. The extension of the Coquihalla Highway from Merritt to Peachland, to be completed in 1990, will also benefit Kelowna in terms of accessibility. Driving time from Vancouver to Kelowna will be reduced.

A major developer has proposed a resort hotel and conference centre complex in Kelowna on Lake Okanagan, near the city centre. The meeting capacity of the conference facility is expected to be approximately 1,000 people. With the addition of this conference facility, Kelowna will be able to compete for large meetings in the 500 to 1,000 person range with Penticton, Whistler, Vancouver and Victoria.

The main resort hotels capable of handling groups of 100 people are the Lakeside Resort in Penticton and the Lake Okanagan Resort in Kelowna. The Lakeside Resort has 204 guest rooms and can accommodate meeting groups in the 400 to 700 range, depending on set up style, and the Lake Okanagan Resort has 194 guest rooms and can handle meeting groups of approximately 200 to 300 people.

Kootenay Country

TABLE B-5

REGION D: KOOTENAY COUNTRY

	TOTAL NUMBER OF			LARGEST THEATRE CAPACITY			LARGEST BANQUET CAPACITY			LARGEST RECEPTION CAPACITY			MEETING FACILITY BREAKDOWN		
CITY	MEET. FACIL.	MEET. ROOMS	GUEST ROOMS	HOTELS	PUBLIC FACIL.	CONV. CENTRE	HOTELS	PUBLIC FACIL.	CONV. CENTRE	HOTELS	PUBLIC FACIL.	CONV. CENTRE	HOTELS	PUBLIC FACIL.	CONV. CENTRE
Castlegar	4	16	241	250	380		280	300		350	320		3	1	
Creston	2	5	24	120	400		80	325		140	450		1	1	
Grand Forks	2	6		300	1,200		350	1,200		400	1,200		1	1	
Nakusp	1	1			400			400			400			1	
Nelson	4	8	116	200	400		180	400		180	400		3	1	
Rossland	1	3	67	180			200			220			1		
Trail	2	11	75	250			200			200			2		
TOTAL	16	50	523										11	5	0

There are 16 facilities in the Kootenay Country tourism region that can accommodate groups of 100 or more people of which five are public facilities. Castlegar, Creston, Grand Forks, Nakusp and Nelson each has a community or recreation centre that can accommodate from 300 to 1,200 people for a meeting depending on the facility. These facilities would tend not to attract large out-of-town meetings due to the limited guest room supply in each of these cities.

Castlegar and Nelson have the highest concentration of hotels with meeting facilities that can cater to groups of 100 people. Each has three hotels with maximum meeting capacities of 200 to 300 people.

There are no resorts in the Kootenay Country tourism region able to accommodate meeting groups of 100 people.

High Country

TABLE B-6

REGION E: HIGH COUNTRY

	TOTAL NUMBER OF			LARGEST THEATRE CAPACITY			LARGEST BANQUET CAPACITY			LARGEST RECEPTION CAPACITY			MEETING FACILITY BREAKDOWN		
CITY	MEET. FACIL.	MEET. ROOMS	GUEST ROOMS	HOTELS	PUBLIC FACIL.	CONV. CENTRE	HOTELS	PUBLIC FACIL.	CONV. CENTRE	HOTELS	PUBLIC FACIL.	CONV. CENTRE	HOTELS	PUBLIC FACIL.	CONV. CENTRE
Ashcroft	2	5	58	120			100			100			2		
Clearwater	1	1	38	220			220			220			1		
Kamloops	12	34	579	500	4,000		350	3,000		550	3,000		7	5	
Merritt	1	2	46	300			200			350			1		
Revelstoke	4	13	256	250	678		200	678		250	678		3	1	
Salmon Arm	3	7	102	225	600		180	444		225	600		2	1	
TOTAL	23	62	1,079										16	7	0

The majority of meeting facilities (52 percent) in the High Country tourism region are located in Kamloops. There are seven hotels in Kamloops with meeting facilities capable of handling groups of 100 people. These seven hotels represent a combined guest room total of 579 rooms. The largest hotel meeting capacity in Kamloops is 500 people theatre style at the Stockmen's Hotel. Kamloops also has five public facilities that can handle large groups. The largest meeting capacity is available at the Kamloops Exhibition Centre arena. This facility can handle meeting groups of 3,000 to 4,000 people.

There are three hotels with meeting capacities in the 100 to 250 person range in Revelstoke. The largest hotel meeting facility is the Three Valley Gap Motor Inn with 117 guest rooms and a meeting capacity of 200 to 250 people. The Revelstoke Community Centre can accommodate meeting groups of approximately 650 to 700 people.

Aside from Revelstoke and Kamloops, Merritt is the only city in the High Country region capable of handling meetings of 100 people. The Grasslands Motor Hotel has a meeting capacity of 200 to 300 people. However, the guest room supply in Merritt is limited.

Cariboo

TABLE B-7

REGION F: CARIBOO

	TOTAL NUMBER OF			LARGEST THEATRE CAPACITY			LARGEST BANQUET CAPACITY			LARGEST RECEPTION CAPACITY			MEETING FACILITY BREAKDOWN		
CITY	MEET. FACIL.	MEET. ROOMS	GUEST ROOMS	HOTELS	PUBLIC FACIL.	CONV. CENTRE	HOTELS	PUBLIC FACIL.	CONV. CENTRE	HOTELS	PUBLIC FACIL.	CONV. CENTRE	HOTELS	PUBLIC FACIL.	CONV. CENTRE
100 Mile House	4	14	185	300	210		230	200		200	210		3	1	
Quesnel	2	3	37	40	1,200		70	900		100	900		1	1	
Williams Lake	6	11	166	500	500		400	350		500	800		3	3	
TOTAL	12	28	388										7	5	0

The meeting facilities in the Cariboo tourism region that can cater to groups of 100 people are located in three cities, 100 Mile House, Quesnel and Williams Lake. Both 100 Mile House and Williams Lake have three hotels each that can accommodate large meeting groups. The largest meeting capacity in Williams Lake is 400 to 500 people, compared to 200 to 300 in 100 Mile House.

Both Quesnel and Williams Lake have public facilities able to accommodate meeting groups in the 1,000 person range. Again, groups of this size would be almost exclusively local in origin. The room supply in Quesnel, in particular, precludes it from accommodating meetings of over 100 people.

The largest resort property in the Cariboo in terms of meeting capacity is the Hills Health Ranch in 100 Mile House. It has 76 guest rooms and a meeting capacity of 200 to 300 people.

North by Northwest

TABLE B-8

REGION G: NORTH BY NORTHWEST

	TOTAL NUMBER OF			LARGEST THEATRE CAPACITY			LARGEST BANQUET CAPACITY			LARGEST RECEPTION CAPACITY			MEETING FACILITY BREAKDOWN		
CITY	MEET. FACIL.	MEET. ROOMS	GUEST ROOMS	HOTELS	PUBLIC FACIL.	CONV. CENTRE	HOTELS	PUBLIC FACIL.	CONV. CENTRE	HOTELS	PUBLIC FACIL.	CONV. CENTRE	HOTELS	PUBLIC FACIL.	CONV. CENTRE
Atlin	1	2			200			190			190			1	
Burns Lake	1	1	24	120			100			110			1		
Dease Lake	1	1			200			150			200			1	
Fort St. James	1	1			1,000			800			1,000			1	
Houston	3	7	52	75	275		70	200		100	275		1	2	
Kitimat	3	10	48	150	3,000		125	1,500		150	100		1	2	
Prince George	9	40	788	600	1,000		470	900		600	1,000		8	1	
Prince Rupert	5	13	293	325	900		300	1,200		375	1,400		3	2	
Smithers	2	7	160	180			180			200			2		
Terrace	4	12	200	300	1,250		250	240		300	1,500		3	1	
Vanderhoof	1	2	32	150			100			150			1		
TOTAL	31	98	1,597										20	11	0

The majority of large capacity meeting facilities in the North by Northwest tourism region are located in Prince George. There are eight hotels and one public facility that can accommodate groups of 100 or more. The largest hotel meeting room capacity is 500 to 600 people. The hotels have a combined total of 788 guest rooms. Prince George is the largest meeting centre north of the Okanagan region.

Prince Rupert and Terrace have three hotels each with meeting facilities that can handle groups of 100 people. The largest meeting capacity in both cities is approximately 300 people. The guest room capacity at hotels in Prince Rupert that can cater to meeting groups of 100 people however is a third larger than in Terrace, 293 rooms as compared to 200.

Most meetings outside of these three cities would either be local in nature or of less than 100 people due to the restraints of guest room supply. There are 11 public facilities in eight cities located throughout the North By Northwest region that are able to handle groups of 100 people. These facilities are all civic or recreation centres.

Peace River, Alaska Highway

TABLE B-9

REGION H: PEACE RIVER / ALASKA HIGHWAY

	TOTAL NUMBER OF			LARGEST THEATRE CAPACITY			LARGEST BANQUET CAPACITY			LARGEST RECEPTION CAPACITY			MEETING FACILITY BREAKDOWN		
CITY	MEET. FACIL.	MEET. ROOMS	GUEST ROOMS	HOTELS	PUBLIC FACIL.	CONV. CENTRE	HOTELS	PUBLIC FACIL.	CONV. CENTRE	HOTELS	PUBLIC FACIL.	CONV. CENTRE	HOTELS	PUBLIC FACIL.	CONV. CENTRE
Dawson Creek	3	8	138	400	100		400	100		400	100		2	1	138
Fort Nelson	1	1			425			425			425			1	
Fort St. John	2	7	195	500			300			500			2		195
Hudson's Hope	1	1			275			275			275			1	
TOTAL	7	17	333										4	3	333

The Peace River, Alaska Highway tourism region has the fewest number of meeting facilities that can accommodate meeting groups of 100 people. Two cities, Dawson Creek and Fort St. John offer hotel meeting facilities that can accommodate large groups. Each city has two hotels with meeting facilities that can handle 100 people. The largest meeting capacity in both cities ranges from 300 to 500 depending on the style of meeting room set up.

Recreation or community centres capable of handling groups of 100 people are located in Dawson Creek, Fort Nelson and Hudson's Hope.

TABLE B-10

REGION I: ROCKY MOUNTAIN

CITY	TOTAL NUMBER OF			LARGEST THEATRE CAPACITY			LARGEST BANQUET CAPACITY			LARGEST RECEPTION CAPACITY			MEETING FACILITY BREAKDOWN		
	MEET. FACIL.	MEET. ROOMS	GUEST ROOMS	HOTELS	PUBLIC FACIL.	CONV. CENTRE	HOTELS	PUBLIC FACIL.	CONV. CENTRE	HOTELS	PUBLIC FACIL.	CONV. CENTRE	HOTELS	PUBLIC FACIL.	CONV. CENTRE
Cranbrook	5	15	343	400	2,500		300	1,000		400	2,500		4	1	
Elkford	1	4			300			300			300			1	
Fairmont H.S.	1	8	140	450			325			400			1		
Fernie	2	2			900			650			900			2	
Field	1	9	72	80			80			100			1		
Golden	1	1			300			300			300			1	
Invermere	3	10	295	255	450		200	450		300	450		1	2	
Kimberley	4	11	271	350	2,200		500	2,200		500	2,200		2	2	
Radium H.S.	2	6	154	100			100			120			2		
Sparwood	1	2	82	100			80			80			1		
TOTAL	21	68	1,357										12	9	0

The Rocky Mountain tourism region has 21 meeting facilities capable of handling large groups; twelve of these are hotels and nine are public facilities. The largest centre for meeting facilities is Cranbrook where four hotels have meeting facilities that can accommodate groups of 100 or more. The Inn of the South has the largest hotel meeting capacity (300 to 400 people) in Cranbrook and the largest supply of guest rooms (101 rooms).

The Rocky Mountain region has six resorts that can cater to meeting groups of 100 to 500 people, depending on set up style. These properties are the Fairmont Hot Springs Resort, the Emerald Lake Lodge in Field, the Panorama Ski Resort in Invermere, the Kimberley Ski and Summer Resort and the Best Western

Radium Golf Resort and the Radium Hot Springs Lodge. These resorts benefit from their proximity to the Alberta meeting market. Calgary, in particular, is within about 150 to 200 kilometres of most major locations in the Rocky Mountain region.

Product Inventory Access

Information collected from the product inventory questionnaires is available from the Meetings and Incentive Travel Department of the Ministry of Tourism.

The main objective of this section of the Meetings Market study was to create a detailed inventory of meeting facilities in order that both the province and the private sector can provide up-to-date information to prospective meeting groups. To this end, information from the Product Inventory questionnaire will be combined with the current Ministry of Tourism convention and meeting facility inventory to create the most up-to-date listing of British Columbia meeting facilities.

7. MARKET PROFILE

Due to the low response to the Market Profile questionnaire, an analysis of the data received would be inconclusive. The one conclusion that can be made from the Market Profile questionnaire, however, is that management at most meeting facilities in British Columbia are, at this time, unable to provide documentation regarding their meeting market. This information would be invaluable in gauging historical performance and directing future marketing.

8. CONCLUSIONS AND IMPLICATIONS

Although each tourism region has meeting facilities that can accommodate groups of 100 or more people, the regions vary in terms of the proportion, number and type of meeting facilities that cater directly to meeting groups, i.e. hotels and convention/conference centres, as opposed to public/community buildings whose primary use is usually not as a meeting facility. This is not necessarily negative if the mix of facilities serves the needs of the community. It will, however, dictate the types and numbers of meeting groups that a community can attract, particulary provincial and out-of-province meeting groups. As well, issues such as transportation access, accommodation room base and availability of amenities will also dictate the types of meetings that a particular location can attract.

Meeting planners want to know that the number and quality of meeting and guest rooms is adequate to accommodate all attendees. This requires ongoing renovation and upkeep of both meeting and guest rooms. It also requires that meeting facilities be planned to provide the most comfortable and usable space possible, i.e. unobstructed views from all points in the room, good lighting, proper ventilation, comfortable seating, etc.

It is important to have the most current information available for marketing the province as a meeting destination. Therefore, in future, the onus will be on the management at meeting facilities to continue to inform the Ministry of Tourism of the facilities and services available in their premises and to update the Ministry on renovations and additions to their properties. This will ensure that the most up-to-date inventory of meeting facilities in British Columbia will be available to planners and the industry in general.

The low response to the Market Profile questionnaire indicates that meeting facilities may find a standard process for recording data on meeting groups booked to be useful. This would serve as an ongoing monitor of sources of demand for meeting facilities and an indication of future potential. However it must be noted that most major hotel companies have predetermined categories for meeting business with little consistency amongst them.

SECTION C

MEETING PLANNERS' SURVEY

1. INTRODUCTION

To ascertain the potential British Columbia has for attracting new meeting business, it is necessary to understand the decision making process a planner has for choosing a meeting site and, more specifically, the image held of British Columbia.

The intent of this component of the Meeting Market study was to ascertain the best market opportunities for the British Columbia meeting product through use of focus group sessions and a telephone survey with planners across North America.

2. OBJECTIVES

The objectives of the focus groups and telephone survey of meeting planners were as follows:

- estimate British Columbia's share of the meeting market;
- characterize the largest meeting organized by the planners;
- measure meeting planners' awareness of British Columbia cities;
- discover planners' image of British Columbia locations;

- determine the barriers which prevent planners from bringing meetings to British Columbia;
- find out where planners get their information about sites; and,
- reveal the decision making process which leads to the selection of a site.

This report summarizes the findings of the focus groups and telephone survey. More detailed analyses may be found in the annex to this report.

3. METHODOLOGY

The first research project with meeting planners was a series of focus groups, conducted in six cities: Seattle, Toronto, Ottawa, Washington, D.C., Chicago and Los Angeles. The focus groups were conducted in the autumn of 1988.

The second project was a telephone survey of meeting planners conducted across North America between March 7 and March 28, 1989. In total, 606 planners were interviewed. The sample was divided equally between the Pacific Northwest, defined as British Columbia, Alberta, Washington, Oregon and California, and the rest of North America. In the Pacific Northwest, organizations were sampled whose largest meeting held in the previous year had 100 or more attendees; in the rest of North America, we selected organizations whose largest meeting had 300 or more attendees. Five hundred and five interviews were completed with American planners and 101 interviews with Canadian planners. Both the American and Canadian samples were divided evenly between the west and east. The goal was to interview people in the key decision making positions in their respective organizations and responsible for the planning of meetings, conventions and trade shows. The sampling error for the total sample is 4.4 percent of the 95 percent level of confidence.

The samples for both the focus groups and the telephone survey were drawn from registries of meeting planners. The interviewer asked to speak to the individual listed in the registry. If he or she was no longer working in the organization, the interviewer then asked to speak to the person who "is most responsible for planning your conferences and meetings". Because of the different sampling criteria used in the Pacific Northwest as opposed to the rest of Canada and the United States, data will be presented by the following subgroups Western Canada (British Columbia and Alberta), Western United States (Washington, Oregon and California), Eastern Canada and Eastern United States. These subgroups are representative of meeting planners in their respective areas, however they cannot be combined because smaller companies were allowed as part of the northwestern samples.

4. BRITISH COLUMBIA'S SHARE OF THE MEETING MARKET

Size of the Total Market

The meeting planners sample was asked how many meetings they had organized during the past year in each of four size categories. Table C-1 displays their responses by average number of meetings planned in each category.

TABLE C-1
MEAN NUMBER OF MEETINGS HELD BY SIZE OF MEETING

Q3. How many meetings did your organization hold in the past year with between [meeting size] people attending?

Meeting Size:	Western U.S.	Eastern U.S.	Western Canada	Eastern Canada
1 to 100				
Percentage of organizations holding meetings of this size	87%	83%	97%	88%
Average number of meetings held by all organizations	19.6	40.7	22.9	25.7
Base	(233)	(242)	(57)	(41)
101 to 500				
Percentage of organizations holding meetings of this size	81%	88%	83%	83%
Average number of meetings held by all organizations	5.1	10.5	2.3	11.0
Base	(240)	(256)	(58)	(42)
501 to 1,000				
Percentage of organizations holding meetings of this size	19%	36%	18%	21%
Average number of meetings held by all organizations	.3	.6	.2	.1
Base	(110)	(174)	(15)	(27)
Over 1,000				
Percentage of organizations holding meetings of this size	19%	26%	7%	17%
Average number of meetings held by all organizations	.3	.4	.1	.1
Base	(57)	(83)	(6)	(12)
Total				
Average number of meetings held by all organizations	25.3	52.2	25.5	36.9
Average number of attendees per meeting	157	134	96	146
Total number of attendees per year	3,972	6,995	2,448	5,387

The American planners differ in terms of the number of meetings they plan - those located in the Western United States are responsible for fewer than half the number of meetings planned by the average Eastern American planner. Just over three quarters of the meetings planned by Americans in any location have 100 or fewer attendees and one fifth have between 101 and 500. Meetings larger than 500 individuals account for about two percent of the total number of meetings planned by Americans.

Among Canadians, region also makes a substantial difference in terms of the number and size of meetings planned. In Western Canada, 90 percent of the meetings planned have 100 or fewer attendees and nearly all of the remainder have 101 to 500 attendees. Planners not only plan more meetings in Eastern Canada (almost 50 percent more), the meetings are also of a larger average size; 70 percent fall into the 1 to 100 range, while most of the remainder attract 101 to 500 attendees. Approximately one percent of meetings planned by Canadians have more than 500 attendees. In summary, planners in the Western United States and Western Canada plan approximately two meetings per month. Planners in Eastern Canada plan about three meetings per month and in the Eastern United States, more than four meetings per month. Meetings planned outside Western Canada have similar average sizes, ranging from 134 in the Eastern United States to 146 in the Eastern Canada and 157 in the Western United States. Western Canadian planned meetings attract substantially fewer attendees (an average of 96 attendees).

Future Growth of the Total Market

Planners were asked to estimate the extent to which the number of meetings planned by their organizations would increase or decrease in the next three years.

To relate this data to the potential growth of the British Columbia market, this question was asked only of those planners who had not held a meeting in British Columbia in the past, but felt that a meeting in British Columbia was a possibility for the future. Table C-2 contains these responses.

TABLE C-2

FUTURE GROWTH IN THE MEETING MARKET

Q13. Do you think the number of meetings your organization will hold in the next three years will increase or decrease compared to the last three years? Will it (increase/decrease) a lot or just a little?

	Western U.S.	Eastern U.S.	Western Canada	Eastern Canada
Increase a lot	12%	21%	9%	14%
Increase just a little	43%	35%	21%	49%
Stay the same	38%	40%	70%	37%
Decrease just a little	6%	4%	0%	0%
Decrease a lot	1%	0%	0%	0%
	100%	100%	100%	100%
	(94)	(113)	(33)	(35)

These figures show that among those planners not located in Western Canada, the market appears to be growing steadily. Approximately 60 percent of these planners expect growth in the number of meetings planned by their organizations.

Western Canadian planners, however, are not nearly so optimistic. Approximately 30 percent of these planners expect growth in the next three years.

Size of British Columbia's Actual Share of the Meeting Market

Each of the planners was asked not only how many meetings his or her organization had planned in 1988, but also whether any of these meetings were held in British Columbia. Table C-3 shows the proportion of planners from each of the geographic areas responding that they had planned a meeting in British Columbia during the previous year.

TABLE C-3

PROPORTION OF PLANNERS BRINGING A MEETING TO BRITISH COLUMBIA IN THE PREVIOUS YEAR

Q7. Were any of these meetings held in British Columbia?

	Western U.S.	Eastern U.S.	Western Canada	Eastern Canada
Yes	5%	3%	47%	37%
Base	(242)	(259)	(59)	(41)

This table shows that a small percentage of the American planners had brought meetings to British Columbia in the previous year. The data also shows that British Columbia attracts business from about a third of the planners located in Eastern Canada in a given year.

It is interesting that not even half of the companies in Western Canada had placed a meeting in British Columbia in the previous year. If however we divide this group into those planners from British Columbia and those from Alberta, we find that, while 100 percent of the British Columbia planners had placed a meeting in the province, the same was true of only 14 percent of the Alberta planners.

In addition to determining the proportion of planners that brought a meeting to British Columbia, planners were also asked how many of their meetings had been held in British Columbia in the previous year. These responses are reported in Table C-4, by size of meeting.

TABLE C-4
BRITISH COLUMBIA'S MARKET SHARE, BY SIZE OF MEETING

Meeting size:	Western U.S.	Eastern U.S.	Western Canada	Eastern Canada
1 to 100	.6%	.5%	33.8%	11.0%
101 to 500	1.9%	.6%	44.1%	7.5%
501 to 1,000	0.0%	.6%	18.3%	0.0%
Over 1,000	0.0%	.2%	7.9%	0.0%
All Meetings	.8%	.5%	33.0%	9.6%
Base	(240)	(256)	(58)	(41)

These figures reveal an interesting picture. One third of all meetings planned by Western Canadian planners are held in British Columbia. Next, the province attracts about 10 percent of the meeting business of Eastern Canadian planners, but no meetings from Eastern Canada (in this sample) of over 500 attendees.

Looking at the figures reported by the American planners, one might conclude that British Columbia's share of this market is practically non-existent. Conversely, our sample indicates that a third of the meetings held in British Columbia come from the United States. The American market is so large that even British Columbia's very small share results in a substantial amount of business.

Size of British Columbia's Potential Share of the Meeting Market

The figures reported above, which show British Columbia's current share of the North American meeting market, suggest that there is a great deal of potential for expansion of market share. This hypothesis is strongly supported by the figures in the next table. Table C-5 reports the responses to a question asking whether each planner felt that he or she might bring a meeting to British Columbia in the future.

TABLE C-5
POSSIBLE FUTURE MEETINGS IN BRITISH COLUMBIA

Q7A. Is it possible that your organization might hold meetings in British Columbia in the future?

	Western U.S.	Eastern U.S.	Western Canada	Eastern Canada
Have held meetings in British Columbia in the previous year	5%	3%	47%	37%
Could hold meetings in British Columbia in future	35%	40%	11%	46%
Total potential market	40%	43%	58%	83%
Ratio of total potential market to held meetings in British Columbia	8.0	14.3	1.2	2.2

This table indicates that the size of the potential market is inversely related to the success British Columbia has already achieved. In the Western Canadian market, where British Columbia's penetration is the highest, the additional number of planners that remain to be attracted to the province is small, both in relative and absolute terms. Even if every planner from this area who has not held a meeting in British Columbia were attracted to the province next year, the number of planners (and presumably the number of meetings) would expand by a factor of 1.2 (from 47 to 58 percent).

The potential in other regions is however far greater. In Eastern Canada, attracting all potential planners to the province would multiply market share by 2.2 (from 37 to 83 percent).

In the United States, because British Columbia's current share is so small, the potential for increase is substantial. Among planners in the Western United States, British Columbia's share would increase eight times if all those planners who said they could come to British Columbia were convinced to do so (a shift from 5 to 40 percent). In the Eastern United States, a similar change would expand market share over 14 times (from 3 to 43 percent).

To help estimate future market share, a final question was asked about the location of meetings already planned for the future. Table C-6 presents these results.

TABLE C-6
FUTURE MEETINGS PLANNED FOR BRITISH COLUMBIA

Q14. Do you plan to hold any meetings in British Columbia within the next three years?

	Western U.S.	Eastern U.S.	Western Canada	Eastern Canada
Yes, firm plans	3%	2%	50%	32%
Yes, plans not firm	6%	8%	4%	25%
Yes, both firm and not firm	1%	1%	2%	5%
Plans not yet made	14%	14%	2%	9%
Do not plan to meet in British Columbia	72%	72%	42%	29%
Do not know	4%	3%	0%	0%
	100%	100%	100%	100%
	(240)	(256)	(58)	(41)

Because the time frame of three years does not match the one year retrospective period for having held meetings in British Columbia in the past, a direct comparison cannot be made of meetings held to those planned to estimate future change in the size of the meeting market.

However, we can derive an estimate of the current penetration of the four categories of planners in the sample. About 10 percent of the American respondents, regardless of origin, say they are currently planning to hold a meeting in British Columbia. While 56 percent of Western Canadians and 64 percent of Eastern Canadians report plans to meet in the province at some point over the next three years.

Conclusions and Implications

The meeting market is large and growing rapidly. The planners in our sample reported that they planned, on average, anywhere from 25 to 52 meetings per year depending on geographic location. Eastern United States planners are the most active, each one planning over 52 meetings per year. Eastern Canadian planners follow with almost 37 meetings planned per year. Planners in the Pacific Northwest report responsibility for fewer meetings. On both sides of the border, northwestern planners report planning about 25 meetings per year.

Because the total number of meeting planners in North America is not known, we cannot use the above figures to calculate the total number of meetings planned. However, using a rule of thumb that, based on population, the American economy is about 10 times the size of the Canadian economy and American planners on average plan approximately 50 percent more meetings than Canadian planners, therefore it is estimated that the American meeting market is about 15 times as large as the Canadian meeting market. This figure is based on the assumptions noted above and cannot be verified.

British Columbia has not been very successful in attracting meeting business when one considers the total size of the market, and the fact, to be discussed later in this report, that British Columbia has an extremely positive image in the eyes of meeting planners. British Columbia attracts only one third of the meetings planned by British Columbians and Albertans and only 10 percent of meetings planned by other Canadians. Among Americans, British Columbia services less than one percent of their meetings.

The success that has been achieved to date in attracting meeting business is minimal in contrast to the potential that exists. British Columbia has come closest to achieving its potential market share in Western Canada, where the province could attract meetings from 58 percent of all planners, given proper facilities and marketing. (Many planners from Alberta however say that they cannot or will not come to British Columbia.) Since 47 percent of this group held at least one meeting in the province in the past year, the province's meeting activity has the potential to increase by a factor of 1.2 among planners in this region.

If all planners from Eastern Canada who said they could hold a meeting in British Columbia could be convinced to do so, meeting activity from this region would multiply 2.2 times. Similarly, for planners in the Western United States meeting activity would multiply by a factor of eight, and in the remainder of the United States, the increase would be by a factor of over 14.

Potential clearly exists to attract more meeting business although it varies depending on the origin of the business. Expanding the market in British Columbia and Alberta will be difficult because of the already high level of penetration and because most of the meetings held by companies in these provinces are small, attracting under 100 attendees. Efforts in Alberta will be frustrated by the high proportion of companies in that province which, for policy reasons, cannot come to British Columbia to hold their meetings. The best prospect from this market will be for the smaller centres and facilities which can handle smaller meetings with a high level of service.

Marketing efforts in Western Canada should therefore concentrate on attracting a larger proportion of the meetings planned by those planners who are already in the habit of coming to British Columbia. Efforts should especially be targeted to British Columbians who are taking meetings outside the province, informing them of unusual opportunities within the province.

Eastern Canada represents a good opportunity to increase the amount of meeting business coming to British Columbia. In terms of penetration, this area has been exploited by British Columbia to a far lesser extent than is true of the two western provinces. The potential for increased activity is therefore greater. Planners in Eastern Canada plan an averages 45 percent more meetings per year than those in Western Canada, so convincing one of them to bring meetings to British Columbia has the promise of a greater payoff over the course of time than would be the case if he or she resided in Alberta or British Columbia. In addition, Eastern Canadian planners are responsible for several times more meetings in the 100 to 500 attendee range than Western Canadian planners. This difference is reflected in the average size of meetings originating from Eastern Canada versus those originating from Western Canada (146 attendees versus 96 attendees respectively).

The American market holds much greater potential for the future expansion of the meetings industry in British Columbia. Penetration to date has been very modest and there are many times more planners who say they could hold meetings in the province than have done so in the past year.

The findings that have been presented in this section (British Columbia's share of the meeting market) are summarized in Table C-7.

TABLE C-7

SUMMARY STATISTICS DESCRIBING BRITISH COLUMBIA'S SHARE OF THE NORTH AMERICAN MEETING MARKET

	Western U.S.	Eastern U.S.	Western Canada	Eastern Canada
Average number of meetings	25.3	52.2	25.5	36.9
Average number of attendees per meeting	157	134	96	146
Total attendees at meetings planned in 1988	3,972	6,995	2,448	5,387
Expected increase in number of meetings planned	55%	75%	30%	63%
British Columbia's share of all 1988 meetings	.8%	.5%	33%	10%
Percentage of companies holding meetings in British Columbia in 1988	5%	3%	47%	37%
Percentage of companies which could hold meetings in British Columbia (but did not hold one in 1988)	35%	40%	11%	45%

5. CHARACTERISTICS OF THE PLANNERS' LARGEST MEETING

Size of the Largest Meeting

One fifth of all respondents reported that their largest meeting had between 100 and 249 attendees. Close to one quarter reported that their largest meeting had between 250 and 499 attendees. Three in ten respondents held meetings with 500 to 1,000 attendees, and one in four claimed that more than 1,000 people had attended their organization's largest meeting. The United States planners tended to report substantially larger meetings than did their Canadian counterparts.

Note that these distributions are affected by the sampling procedures: In the Western United States and Western Canada, companies whose largest meeting had more than 100 attendees selected, while in the remainder of the sample, the criterion was raised to 300 attendees.

TABLE C-8
SIZE OF LARGEST MEETING

Q1. First, how many people attended the largest meeting your organization held during the past year?

	Western U.S.	Eastern U.S.	Western Canada	Eastern Canada
	(241)	(262)	(59)	(42)
100 to 249	35%	3%	42%	7%
250 to 499	19%	30%	32%	29%
500 to 999	19%	31%	14%	31%
1,000 to 2,000	14%	24%	4%	26%
Over 2,000	13%	12%	7%	7%
	100%	100%	100%	100%
Mean	1,697	2,221	880	1,134
Median	400	675	300	600

The large differences between the means and the medians indicate that a few respondents reported very large meetings.

Location of Largest Meeting

Among cities specified as the site of each organization's largest meeting in the past year, Seattle was mentioned by 4.3 percent of respondents, followed by Los Angeles (3.6 percent), San Diego (3.4 percent), Vancouver (3.4 percent) and Chicago (3.2 percent). Combined, California locations were mentioned by 18 percent of respondents and, overall, sites in the Pacific Northwest were chosen by 46 percent of the organizations contacted. These figures reflect both the deliberate oversampling of Pacific Northwest companies and associations, and the high proportion of California organizations within that sample.

Of the 3.4 percent of respondents who cited Vancouver as the location of their largest meeting, half were from British Columbia, and 20 percent were from Ontario, with the remainder coming from Alberta (five percent), Washington (10 percent), Oregon (five percent) and other states within the United States (five percent).

Among organizations choosing other locations in British Columbia as the site of their largest meeting, 77 percent were British Columbia organizations. As is evident elsewhere in this report, knowledge of locations outside Vancouver and Victoria is limited almost entirely to planners who are located within the province.

Of all British Columbia organizations in the sample, 39 percent chose locations outside Vancouver for their largest meeting.

Of the American planners surveyed, 93 percent held their largest meeting in the past year in the United States, three percent in Canada and four percent elsewhere. Canadian groups held 95 percent of their meetings in Canada, and five percent in the United States.

Of the Canadian cities named, Vancouver ranked first among both Canadian (16 percent of those interviewed) and American (one percent) meeting planners.

TABLE C-9

LOCATION OF LARGEST MEETING

Q2. In what city did you hold this meeting?

	Western U.S.	Eastern U.S.	Western Canada	Eastern Canada
	(234)	(255)	(54)	(42)
Vancouver, B.C.	2%	0%	20%	10%
Seattle, WA	10%	0%	0%	0%
Portland, OR	8%	0%	0%	0%
San Francisco, CA	4%	1%	0%	0%
Los Angeles, CA	8%	1%	0%	0%
Anaheim, CA	3%	1%	0%	0%
San Diego, CA	6%	2%	0%	0%
Calgary, Alberta	0%	0%	24%	0%
Toronto, Ontario	0%	1%	0%	19%
Montreal, Quebec	0%	1%	2%	12%
New York, NY	0%	3%	0%	0%
Phoenix, ARIZ	1%	5%	0%	0%
Chicago, ILL	2%	6%	0%	0%
Dallas-Ft. Worth, TX	1%	2%	0%	0%
Maui, HA	2%	1%	0%	0%
Washington D.C.	0%	4%	0%	0%
Other, B.C.	0%	0%	15%	0%
Other, Alberta	0%	0%	32%	2%
Other, Canada	0%	0%	4%	50%
Other, WA	8%	0%	0%	0%
Other, OR	5%	0%	0%	0%
Other, CA	17%	2%	0%	2%
Other, NV	2%	2%	0%	0%
Other, HA	3%	5%	0%	2%
Other, FLA	3%	13%	0%	0%
Other, U.S.	10%	45%	4%	2%
Other, Europe	1%	2%	0%	0%
Other, Latin America	1%	2%	0%	0%
Other	1%	2%	0%	0%

Conclusions and Implications

It is important to remember that the phrase "largest meeting" does not necessarily mean a meeting with more than 1,000 attendees. In fact, meetings this large are organized by fewer than one quarter of the respondents in this survey. In Western Canada, only 10 percent of the planners reported a meeting this large.

These figures corroborate what was discovered in the preceding section. Only a very small proportion of meetings held by most organizations have more than 500 people in attendance. Marketing to this industry should therefore be split into two distinct activities. One of these should pursue those companies known to hold very large meetings. The other thrust, and probably the major one, should be directed to attract companies which on average plan meetings for 500 or fewer people.

Given this perspective, Vancouver does very well as the venue for the largest meetings held by Canadian planners, ranking third after Toronto and Montreal among Eastern Canadians, and second after Calgary among Western Canadians. (We see here again evidence of the fact that Alberta companies are very likely to stay at home. Whether this is because of organization policy or superior marketing by Alberta cannot be deciphered from this data.)

There are other locations in British Columbia that are popular with Western Canadian planners, but are not used at all by Eastern Canadian planners. This is evident of a problem which will be discussed at length later in this report: planners outside British Columbia know almost nothing about destinations other than Vancouver. British Columbia locations have had very little success in attracting a large share of the meetings planned by Americans. However there may be systemic reasons for this lack of success. Planners want to get their people to the meeting destination in a single travel day, and they need the airline capacity to do this all at the same time. Vancouver, being served by relatively few routes connecting into the United States, has serious problems with serving this demand when large numbers of people are involved.

6. MEETING PLANNERS' AWARENESS OF BRITISH COLUMBIA CITIES

Awareness of British Columbia Cities in the Context of Canadian Cities

The focus group discussions held with Eastern Canadian and some Western American meeting planners revealed one predominant impression: British Columbia enjoys a very positive image in the planners' mind. In Seattle, Toronto and Ottawa, Vancouver was universally known and awareness of Victoria was quite good. Whistler, Harrison Hot Springs and Penticton were also mentioned on occasion.

Planners who participated in the groups held in Washington, D.C., Chicago and Los Angeles displayed quite a different pattern. Among these groups, awareness of British Columbia destinations is limited almost exclusively to Vancouver and, to a small extent, Victoria.

With respect to the telephone survey, among those respondents who indicated it was possible that they might hold a meeting in Canada in the future, more respondents (56 percent) named Vancouver than any other city in Canada as the location they would consider. (The reader should keep in mind that because the questionnaire mentioned British Columbia specifically, the awareness level of Vancouver may be inflated.) The incidence of mentions of Vancouver is surprisingly evenly distributed over the four geographic areas in the sample. The Eastern United States mentioned Vancouver 53 percent of the time, slightly ahead of Montreal (49 percent) and Toronto (50 percent). Closer to home, the western states of California, Oregon and Washington named Vancouver first by an even wider margin; 61 percent of this sample thought of Vancouver compared to just 26 percent who mentioned Toronto. Curiously, the mention of Vancouver is weakest in the Western Canadian part of the sample (47 percent). This may be because of the previously noted tendency of some Alberta organizations not to consider locations outside of Alberta. These figures appear in the Table C-10.

The proportion naming Vancouver as a possible Canadian meeting location rose from the total sample average of 50 percent to 80 percent among those whose organization's largest recent meeting numbered over 1,000. A slightly higher proportion of the United States planners for these large meetings mentioned Vancouver, as compared to the Canadian planners.

One in six of the overall sample mentioned Victoria as a possible Canadian meeting location. These individuals are concentrated among the Canadian respondents and, to a lesser extent, those Americans living in the western states. Awareness of Victoria among Eastern American planners is limited to five percent of this segment of the sample, and their awareness of other British Columbia locations is virtually non-existent.

It is interesting to note that Whistler, mentioned by about four percent of the sample overall, is completely neglected by the Western Canadian group. While this sample is quite small, there should be a greater awareness of this destination among Western Canadian planners.

TABLE C-10

POSSIBLE CANADIAN MEETING LOCATIONS

Q16. Which cities in Canada would you consider as the location for a future meeting of your organization (if you were to plan a meeting in Canada)? Any others? [Multiple responses.]

	Western U.S. (97)	Eastern U.S. (113)	Western Canada (34)	Eastern Canada (35)
Vancouver	61%	53%	47%	66%
Toronto	26%	50%	17%	34%
Montreal	15%	49%	9%	25%
Victoria	18%	5%	38%	31%
Banff/Lake Louise	10%	7%	3%	0%
Calgary	9%	8%	12%	23%
Edmonton	2%	1%	20%	20%
Winnipeg	1%	7%	9%	23%
Halifax	0%	4%	12%	11%
Quebec City	5%	18%	3%	11%
Whistler	7%	3%	0%	6%
Kelowna	0%	0%	6%	3%
Penticton	1%	0%	0%	8%
Ottawa	5%	3%	3%	0%
Nanaimo	0%	1%	6%	0%
Harrison Hot Springs	1%	0%	3%	0%
Other in B.C.	1%	0%	12%	0%
Ontario	2%	1%	0%	3%
Maritime Provinces	0%	0%	3%	8%
Alberta/Saskatchewan/Manitoba	2%	0%	3%	11%
Other	4%	3%	20%	8%
Do Not Know	14%	12%	3%	6%

Familiarity with Vancouver's Hotels and Meeting Facilities

The focus group discussions revealed that planners in Seattle and Eastern Canada have very good awareness of the facilities available in Vancouver. In the rest of the United States, however, there is a near universal lack of hard knowledge of the city's hotels and facilities. In fact, in more than one case, the planners in these cities were unhappy with the fact that they did not know more about British Columbia destinations, especially Vancouver. They have positive images of Vancouver and believe that it would be a good place to hold a meeting. However, some feel that British Columbia has not succeeded in delivering the information they need.

With respect to the telephone survey, once it had been determined that the respondent could in principle hold a meeting in British Columbia, he or she was asked several questions about the province's sites. The first question pertained to the level of familiarity the planner claimed for Vancouver's hotels and meetings facilities.

TABLE C-11
FAMILIARITY WITH VANCOUVER'S HOTELS AND MEETINGS FACILITIES

Q17. How familiar are you with Vancouver (British Columbia) in terms of its hotels and meetings facilities? Are you very familiar, somewhat familiar, not very familiar or not at all familiar?

	Western U.S.	Eastern U.S.	Western Canada	Eastern Canada
	(97)	(113)	(34)	(35)
Very familiar	13%	7%	62%	60%
Somewhat familiar	41%	27%	35%	34%
Not very familiar	33%	29%	3%	6%
Not at all familiar	13%	37%	0%	0%
	100%	100%	100%	100%

Over half of the respondents from the Western United States said that they are very familiar or somewhat familiar with Vancouver in terms of its hotels and meeting facilities, with slightly more than one in three from the rest of the United States agreeing. The figure for Canadian respondents was well over nine out of ten, regardless of whether or not they were from the west.

More American planners say that they consider Vancouver to be a suitable meeting site than say that they are familiar with the city's hotels and meeting facilities. This suggests that the market is undersupplied with information about the city.

Familiarity with Vancouver as a Tourist Destination

Planners participating in the Seattle and Eastern Canadian focus groups displayed a good knowledge of Vancouver as a tourist destination, showing awareness of the range of restaurants, attractions and shopping that is available in the city. Several planners said that they often sell their meetings on the basis of the activities that are available for the spouses or for the attendees themselves to do in their spare time.

As was the case with familiarity of hotel and meeting facilities, American planners living farther away than Seattle had virtually no information about the tourist attractions offered by Vancouver.

These responses are reflected in the telephone survey. Table C-12 presents the results of a question asking for the planner's level of familiarity with Vancouver as a tourist attraction.

TABLE C-12

FAMILIARITY WITH VANCOUVER AS A TOURIST DESTINATION

Q18. And how familiar are you with Vancouver as a tourist destination, that is, its attractions, shopping, nightlife, restaurants and so forth?

	Western U.S.	Eastern U.S.	Western Canada	Eastern Canada
	(97)	(113)	(34)	(35)
Very familiar	16%	7%	59%	60%
Somewhat familiar	42%	19%	35%	31%
Not very familiar	25%	31%	3%	9%
Not at all familiar	17%	43%	3%	0%
	100%	100%	100%	100%

In the above table, we observe that one half of respondents from the Western United States, and one in four Americans from the Eastern United States, were very or somewhat familiar with Vancouver as a tourist destination. The comparable figure for Canadian respondents exceeded nine in ten.

The American planners who think of Vancouver as a potential meeting site far outnumber those who say they are familiar with the city as a tourist destination.

There is very little difference in the level of awareness of Vancouver as a tourist destination and the awareness reported for Vancouver's hotels and meeting facilities. In terms of future action, there appears to be little need to raise Canadians' awareness of Vancouver and indeed, it would be very difficult to increase awareness in this group beyond what is already present. Any future awareness campaign should therefore be concentrated on the United States, especially planners living in the Eastern United States.

Identity of British Columbia Cities Other than Vancouver with which Planners are Familiar

Respondents in both the focus groups and the telephone survey who had held or could in future hold meetings in British Columbia were all asked what other British Columbia city or town they were most familiar with, both in terms of its hotels and meeting facilities and in terms of its tourist attractions.

As noted above, the planners who participated in the focus groups held in the United States, other than Seattle, were almost entirely unable to name a meeting site in the province other than Vancouver.

The same pattern emerges in the telephone survey results. Sixty-one percent of the respondents were unable to name one other location in British Columbia. Western Canadian planners were most knowledgeable of other British Columbia locations, of course. Only 12 percent of this group was unable to name any other location. Just under half of this group named Victoria as the city they are most familiar with outside Vancouver. The seven other locations mentioned appear in Table C-13.

TABLE C-13
FAMILIARITY WITH BRITISH COLUMBIA LOCATIONS OTHER THAN VANCOUVER

Q22. Besides Vancouver, what other city or town in British Columbia are you most familiar with, in terms of its hotels and meetings facilities?

	Western U.S.	Eastern U.S.	Western Canada	Eastern Canada
	(97)	(113)	(34)	(35)
Harrison Hot Springs	0%	0%	3%	0%
Kamloops	0%	0%	3%	0%
Kelowna	0%	0%	11%	0%
Penticton	0%	0%	3%	9%
Prince George	0%	0%	9%	0%
Victoria	37%	7%	47%	51%
Whistler	4%	1%	9%	11%
Other	3%	2%	3%	0%
Do Not Know	56%	90%	12%	29%
	100%	100%	100%	100%

Twenty-nine percent of Canadian meeting planners in Eastern Canada were not familiar with any location in British Columbia outside Vancouver. Eastern Canadian planners concentrate their awareness even more directly on Victoria than do their western counterparts. Whistler and Penticton also are mentioned by these planners.

American meeting planners in general have a great deal of difficulty naming locations in British Columbia outside of Vancouver. Well over half of those living in the western states were unable to do so. Those who could name a location were only familiar with Victoria, with the exception of a few who mention Whistler.

Eastern United States planners are virtually unfamiliar with British Columbia locations other than Vancouver. Only 10 percent of the Eastern American planners were able to name a location. Victoria was named in most cases and, in a few others, Whistler and other "British Columbia" locations.

Familiarity with Other Cities' Hotels and Meetings Facilities

While the focus group participants from Seattle, Toronto and Ottawa were able to identify a few locations other than Vancouver, they were at a loss to say what these locations offered in terms of hotels and meeting facilities. Planners from the more distant locations were unable to discuss any locations other than Vancouver.

Those who were able to name a city or town in British Columbia other than Vancouver in the telephone survey were also asked two further questions about the location with which they were most familiar. In about three quarters of the cases this city was Victoria, nine percent referred to Whistler and smaller numbers of respondents mentioned other locations (see Table C-13).

Planners' level of familiarity with these locations' hotels and meeting facilities appears in Table C-14.

TABLE C-14

FAMILIARITY WITH OTHER CITIES' HOTELS AND MEETINGS FACILITIES

Q23. And how familiar are you with the hotels and meeting facilities in [the name of the city mentioned in the previous question]? (Are you very familiar, somewhat familiar, not very familiar or not at all familiar?)

	Western U.S.	**Eastern U.S.**	**Western Canada**	**Eastern Canada**
	(97)	(113)	(34)	(35)
Very familiar	7%	2%	26%	20%
Somewhat familiar	25%	3%	59%	36%
Not very familiar	10%	3%	3%	9%
Not at all familiar	2%	2%	0%	6%
No site named	56%	90%	12%	29%
	100%	100%	100%	100%

Just five percent of the Eastern American respondents who were aware of a location outside Vancouver claimed to be "very" or "somewhat" familiar with the hotels and meeting facilities in those locations. These responses were given by 32 percent of the Western United States respondents, 56 percent of the Eastern Canadian respondents and 85 percent of the Western Canadian respondents.

Familiarity with Other Cities as Tourist Destinations

Table C-15 contains the responses given to the question asking for level of familiarity with locations outside Vancouver as tourist destinations.

TABLE C-15
FAMILIARITY WITH OTHER CITIES' TOURIST ATTRACTIONS

Q24. How familiar are you with [city named in question 22] as a tourist destination, that is, its attractions, shopping, nightlife, restaurants and so forth?

	Western U.S.	Eastern U.S.	Western Canada	Eastern Canada
	(97)	(113)	(34)	(35)
Very familiar	12%	2%	47%	26%
Somewhat familiar	26%	3%	35%	28%
Not very familiar	4%	2%	3%	11%
Not at all familiar	2%	3%	3%	6%
No site named	56%	90%	12%	29%
	100%	100%	100%	100%

The familiarity of these respondents regarding the tourist activities offered by locations outside Vancouver is nearly the same as that reported for the hotels and meetings facilities. That is, familiarity was almost non-existent among Eastern American planners, increasing to about 38 percent of Western American planners, to 54 percent of Eastern Canadian planners and 82 percent of Western Canadian planners.

Conclusions and Implications

The dominant conclusion to arise from this section is the extremely high level of awareness shared by planners from all geographic areas of Vancouver. Awareness of Victoria is about half that of Vancouver, except for Eastern Americans, who know nothing about British Columbia except that Vancouver is located here. Other locations in British Columbia that are mentioned as possible meeting sites include Victoria, Whistler, Kelowna, Penticton, Nanaimo and Harrison Hot Springs.

Marketing therefore faces two tasks. First, while there is no need to achieve name awareness for Vancouver, name awareness is needed for locations outside of the Lower Mainland. Whistler is a good example. Not one planner in the Western Canadian sample mentioned Whistler as a place they would consider holding a future meeting. In spite of such results, there is opportunity to market these sites, as we shall explore in later parts of this report.

The second marketing task is to provide information about hotels, meeting facilities and tourist attractions to be found in Vancouver as well as in other locations. The American market in particular has expressed its frustration with the paucity of information it has received about British Columbia destinations. The Five Senses direct mail campaign was criticized by two or three of the participants in the Washington, D.C. focus group for failing to deliver hard data.

In this regard, the Eastern United States holds good potential. Only one Eastern American planner in twenty claims familiarity with any British Columbia location other than Vancouver, either in the context of hotels and meetings facilities or tourist attractions.

7. MEETING PLANNERS' IMAGE OF BRITISH COLUMBIA

Perceived Cost

On the whole, planners do not view Vancouver to be a costly place to hold a meeting, at least in the context of other major North American cities. One or two comments were heard in the focus groups regarding the high cost of the hotels, especially at the top end of the scale, as well as the cost of suppliers servicing trade shows. However, this was the exception. Only in Toronto did the group form a consensus that Vancouver is an expensive place.

Group participants did not know enough about other British Columbia locations to comment on the respective cost of holding a meeting there.

Cost was reported to be an important criterion in all focus groups. However, there seemed to be two points of view on the subject. Planners for most associations with limited budgets (and members with limited incomes) were looking for moderate prices. In contrast, planners for associations of high income professionals and for large corporations seemed to be much more conscious of the value they received. They did not mind paying top dollar but they wanted to be assured that everything was going to be adequate.

In the telephone survey, no American planner mentioned the costs of accommodation as a barrier to organizing a meeting in Vancouver. However this response was given by six percent of the Canadian planners.

Adequacy of Facilities

Most planners find the facilities in British Columbia (as far as they are aware of them) to be adequate. In fact, reactions to facilities were very positive. In the telephone survey, only a few planners mentioned the adequacy of meeting facilities as a reason not to plan a meeting in British Columbia. Planners in the focus groups noted only two inadequacies with Vancouver's facilities. First, the size of the convention centre does not fit all planners needs. Second, in the view of some of the planners, there are too few luxury hotel rooms to handle the largest meetings.

A universal concern of meeting planners has to do with facility staff. Planners nearly always rank the hotel and facility staff to be one of the most important components for a successful meeting. Unfortunately, since turnover in the hospitality industry is high and since most large meetings are planned far in advance, the convention or food and beverage manager with whom arrangements are initially made is often replaced by someone else before the meeting takes place. All planners tell stories of misunderstandings which arose from changes in staff.

Transportation

The cost and difficulty of transportation to British Columbia stand the province at a distinct disadvantage vis-a-vis competing destinations. Planners want to get their people to a meeting in one travel day. Because of difficult connections, this is sometimes impossible from Eastern United States locations. The problem is exacerbated by the need to move large numbers of people on the same day.

While meetings in cities other than Vancouver often involve smaller groups of people, the increasing difficulty of transportation to these locations is a concern to some planners.

The cost of travel is also cited by many planners as a barrier to meeting in British Columbia.

Weather

While Vancouver has a reputation as a rainy location, the weather does not influence many planners when choosing a meeting site. This topic came up frequently in the focus groups. Eastern American planners know that Vancouver has a mild climate, but fear that some of the people who attend their meetings assume that British Columbia is frozen solid during the winter. Planners in the Washington, D.C. and Seattle groups in particular expressed concerns about the weather. Eastern Canadians like Vancouver's winter weather, as do Western Americans. While they did not feel that Vancouver or Whistler could compete as a sun destination, Western American planners did not feel deterred by the chance of rain. They do not, with the exception of sun destinations, plan on the basis of weather in any location.

Most Attractive Feature of Vancouver as a Site for the Next Meeting or Convention

British Columbia enjoys a very positive image in the eyes of meetings planners. Words like "clean", "safe", "friendly" and "natural beauty" were frequently heard in the focus groups.

The image of Vancouver was probed specifically in the telephone survey. The results appear in Table C-16, where the first two answers given to the question are recorded.

TABLE C-16

MOST ATTRACTIVE FEATURES OF VANCOUVER

	Western U.S.	Eastern U.S.	Western Canada	Eastern Canada
	(71)	(63)	(26)	(35)
Location in relation to other places	31	21	15	14
Location (general)	8	8	15	6
Location on the water/seaport	8	5	8	9
International/exotic Pacific Rim city	10	5	4	0
All references to location	57	39	42	29
Scenery/natural surroundings	11	29	23	29
Variety of activity/tourist attractions	25	16	23	14
Beauty of the city	10	17	12	23
Accommodations (size/location/quality)	15	10	23	9
Size and quality of meetings facilities	8	10	4	20
Climate	4	19	8	34
Cleanliness of the city	10	2	0	0
Costs	6	2	4	0
The people	3	5	0	0

The figures in Table C-16 show that Vancouver's location is its most valued feature. Location may be referenced in relation to another location (close to Seattle, not local, etc.), or respondents may cite Vancouver's waterfront or Pacific Rim characteristics.

Vancouver's scenery and natural surroundings are mentioned second most frequently (by 22 percent), traditionally one of the city's best features. (Another 15 percent mentioned the beauty of the city and four percent mentioned its cleanliness.) Western Americans are somewhat less impressed by this feature than are other planners, perhaps because there is considerable natural beauty in other coastal cities such as Seattle and San Francisco.

The variety of activities and tourist attractions available in Vancouver is mentioned third most often by 20 percent of the telephone sample. Accommodations (12 percent) and meetings facilities (10 percent) were the only other features that were mentioned by as much as 10 percent of the sample.

Most Attractive Feature of Other British Columbia Cities as Site for Next Meeting or Convention

As we noted above, about three quarters of the "other British Columbia locations" referred to in the questionnaire involved Victoria and another 11 percent referenced Whistler. The features mentioned in the following table can therefore be taken to apply primarily to those two locations.

TABLE C-17
MOST ATTRACTIVE FEATURES OF OTHER BRITISH COLUMBIA CITIES

Q25. In general, what would you say is the most attractive feature of [city named in Table C-13, question 22] as a site for meetings of your organization?

	Western U.S. (36)	Eastern U.S. (9)	Western Canada (24)	Eastern Canada (31)
Variety of activity/tourist attractions	50	33	17	10
Location in relation to other places	25	22	38	29
Scenery/natural surroundings	17	22	25	33
Size and quality of meetings facilities	22	0	17	19
International/exotic Pacific Rim city	31	22	4	5
Climate	0	11	21	10
Skiing	3	22	4	14
Remote/resort/retreat	3	0	8	14
Recreation	8	11	4	0
Convenience	0	11	4	0

The variety of activities and tourist attractions is mentioned most frequently by those planners who were familiar with locations in British Columbia other than Vancouver. Thirty percent of the planners in the telephone sample mentioned this feature. Variety of activity/tourist attractions was mentioned particularly frequently by American planners and underscores how important it is to communicate information about this feature to planners, information which nearly all planners, outside of those living in British Columbia and Alberta, say they lack.

The feature mentioned second most frequently is the location of the site in relation to other places. In the case of Victoria and Whistler, this means their proximity to Vancouver or Seattle. Twenty-nine percent of the planners responding to this question gave this response.

Twenty-three percent of the respondents mentioned the scenery or natural surroundings as the most attractive feature of the location, well below the 42 percent who mentioned this feature in the context of Vancouver.

The size and quality of Victoria and Whistler's meetings facilities were mentioned in fourth position, by 18 percent of the sample. Seventeen percent mentioned the international or exotic nature of the location. No other feature was mentioned by more than nine percent of the sample.

Conclusions and Implications

British Columbia's greatest strength in the meetings and convention industry is the nearly universal name recognition of Vancouver, coupled with an extremely positive image. Participants in the focus groups indicated that their eastern clients were eager to visit Vancouver. Victoria also received high praise, although levels of awareness are lower than for Vancouver. British Columbia generally is seen as safe, friendly, clean and hospitable.

The major task in the marketing of the meeting industry is to supply planners with the hard data they need to back-up their image of British Columbia locations. This marketing should certainly concentrate on British Columbia's strengths: its natural beauty, and the variety of the activities available. However, planners need to know much more about facilities and hotels, particularly those located outside Vancouver.

There are aspects of British Columbia locations that cannot be changed, such as its inaccessibility in relation to some locations. Planners of very large meetings have trouble coming to Vancouver because of the limited air access: there are not enough airline seats coming into the city in a single day to serve the needs of large meetings. At the very least, planners of large meetings should be informed whenever airlines add routes connecting United States cities with Vancouver, Victoria or other British Columbia locations.

8. BARRIERS TO HOLDING MEETINGS IN BRITISH COLUMBIA

Barriers to Holding Meetings in British Columbia

Specific Organization Policy

One specific barrier to meeting in British Columbia is obviously the existence of a formal policy in an organization which forbids it. Table C-18 notes the incidence of such policies.

TABLE C-18
POLICY PREVENTING MEETING IN BRITISH COLUMBIA

Q8. Is there a specific policy in your organization that prevents you from holding meetings in British Columbia?

	Western U.S.	Eastern U.S.	Western Canada	Eastern Canada
	(242)	(263)	(59)	(42)
Yes	14%	10%	19%	10%

It is interesting to note that among the respondents from Canadian organizations outside of Western Canada, one in ten said that a policy preventing meeting in British Columbia existed, while almost one in five from the west indicated this to be so. We have seen in earlier tables that Alberta planners face substantial barriers to meeting in British Columbia. In fact, 31 percent of the Alberta planners in the sample say such a policy exists in their organizations.

Among respondents from the United States, one in seven from the west, and even fewer, about one in ten from the rest of the country, said that they had a policy preventing them from holding meetings in British Columbia.

Specific Reasons

Those who said in the telephone interview that their organizations did not have a policy forbidding them to meet in British Columbia and who did not plan to hold a meeting in the province, were asked whether there were any specific reasons for this decision. Table C-19 presents the results.

TABLE C-19

SPECIFIC REASONS FOR NOT MEETING IN BRITISH COLUMBIA

Q15. What are the specific reasons that you do not plan to hold a meeting in British Columbia?

	Western U.S.	Eastern U.S.	Eastern Canada
	(25)	(40)	(6)
Not British Columbia's turn	24%	3%	50%
No connection with area	4%	10%	33%
Stay close to home/centrally located	12%	20%	0%
Distance/cost	4%	13%	17%
No long range plans	12%	5%	0%
Client chooses site	0%	13%	0%
Preference for resorts	4%	5%	0%
Lack of familiarity	4%	13%	0%
Customs/Border difficulties	8%	5%	0%
Other	52%	33%	17%

It is clear from the above results that planners do not avoid British Columbia because of any specific shortcoming of the province's sites or facilities. Distance is obviously a factor, as we have already observed. Rotation among different locations is a factor with Western Americans and Eastern Canadians, indicating at least that British Columbia is on their list of alternate meeting sites.

Lack of familiarity is cited by a small number of Americans as the reason they do not choose British Columbia as a meeting site. It was also indicated in the focus group discussions that very few Americans have detailed information about British Columbia sites.

Barriers to Holding a Meeting in Vancouver

All respondents who said in the telephone interview that they had at least some familiarity with Vancouver were later asked whether there were any barriers to meeting there. The following table reports the proportion of each of the four geographic groups that said there were barriers, and what these barriers are.

TABLE C-20
BARRIERS TO MEETING IN VANCOUVER

Q21. Are there any major barriers to your organization holding a meeting in Vancouver?

	Western U.S.	Eastern U.S.	Western Canada	Eastern Canada
	(86)	(78)	(34)	(35)
Yes	37%	33%	35%	46%
No	63%	67%	65%	54%

Q21A. What are they?

	Western U.S.	Eastern U.S.	Western Canada	Eastern Canada
	(30)	(26)	(10)	(16)
Travel distance/remote location	20%	27%	20%	25%
Travel costs	20%	8%	20%	31%
Accommodation costs	0%	0%	20%	13%
Customs/duties/taxes	13%	15%	0%	0%
Proximity to client/market	10%	12%	10%	13%
Meeting facilities	0%	15%	10%	0%
We support our local economy	10%	4%	20%	0%
Other	27%	19%	0%	18%

A minority of planners say that there are barriers to meeting in Vancouver. The most important barriers are the travel, distance and costs. Beyond this, planners in all regions say that Vancouver is not close to their clients or their markets.

Canadian planners tend to mention the cost of accommodation as a barrier to meeting in Vancouver more so than do the Americans. However the Americans mention customs as a barrier which is, of course, no barrier for Canadians.

The focus group results present a valuable complement to the above data, because the group participants were not selected according to their familiarity with Vancouver, as were the planners who appear in Table C-20. The focus group participants gave a much stronger impression that they did not include Vancouver on their list of possibilities simply because they knew too little about its hotels, facilities and attractions.

Barriers to Meeting in Another City in British Columbia

Those who, in the telephone survey, said that they were familiar with the hotels and meeting facilities, or the tourist attractions in another city in British Columbia (respondents principally mentioned Victoria or Whistler) were asked whether there were any barriers to meeting in that location, and if so, what those barriers were. The responses to these questions appear in Table C-21.

TABLE C-21

BARRIERS TO MEETING IN ANOTHER CITY IN BRITISH COLUMBIA

Q27. Are there any major barriers to your organization holding a meeting in [name of place indicated by respondent]?

	Western U.S.	Eastern U.S.	Western Canada	Eastern Canada
	(42)	(9)	(30)	(23)
Yes	48%	44%	40%	48%
No	52%	56%	60%	52%

Q27A. What are they?

	Western U.S.	Eastern U.S.	Western Canada	Eastern Canada
	(15)	(4)	(10)	(11)
Travel distance/remote location	40%	50%	30%	64%
Travel costs	13%	25%	30%	0%
Lack of direct flights	0%	0%	10%	18%
Meeting facilities	7%	0%	20%	0%
Other	40%	50%	30%	64%

About half of all planners, in all geographic areas, said that there were barriers of some sort to meeting in Victoria or Whistler. Travel distance, costs and inconvenience make up the majority of barriers mentioned.

Conclusions and Implications

One way to convince planners to come to British Columbia involves helping them to overcome the barriers which they see as preventing them from choosing this province. While nothing can be done to change the province's geographic location, marketing can certainly make planners aware of all travel alternatives. For example, planners should be informed of the airline seat capacity coming into Vancouver from major American cities, per day. They should also be aware of other means of accessing British Columbia, fly to Seattle and take the ferry to Victoria, etc.

Americans tend to be concerned about customs problems. This was expressed much more clearly in the focus groups than in the telephone survey, suggesting that we may have discovered this to be more of a problem for the latter if we had direct questioning on the subject. However several group participants who had experience bringing meetings to Canada said that if one knew the system, there were no problems. Perhaps the most important information to provide on this subject is that it is possible to get in and out of Canada without customs hassles if a planner knows the process.

9. WHERE MEETING PLANNERS GET THEIR INFORMATION ABOUT SITES

Advertising

Advertising can be conveyed to meeting planners in a variety of forms. One of these is magazines. Table C-22 contains the names of the trade magazines read by the telephone sample.

TABLE C-22

MAGAZINES READ BY MEETING PLANNERS

Q30. What meeting planners' publications do you receive regularly? [Multiple responses].

	Western U.S.	Eastern U.S.	Western Canada	Eastern Canada
	(174)	(215)	(34)(33)	
Association Management	14%	3%	6%	6%
Best's Insurance Convention Guide	1%	4%	0%	0%
Canadian Association	0%	0%	3%	6%
Canadian Industry Shows and Exhibitions	0%	1%	0%	0%
Conference World	1%	1%	0%	0%
Conferences and Exhibitions International	0%	1%	3%	0%
Convention World	2%	2%	3%	3%
Corporate Meetings and Incentives	11%	22%	0%	9%
Medical Meetings	3%	1%	3%	3%
Meetings and Conventions	41%	61%	21%	33%
Meetings and Incentive Travel	5%	15%	18%	12%
Successful Meetings	32%	43%	6%	39%
Tagungs Wirtschaft	0%	1%	0%	0%
Western Meeting News	10%	19%	3%	12%
Other specific trade magazines	44%	23%	12%	46%
Other	48%	65%	56%	55%

The above data indicates that two magazines, Meetings and Conventions and Successful Meetings, are read most frequently by this sample. The former is the dominant publication in the American market, while the latter is read most frequently by Eastern Canadian planners (along with Meetings and Conventions).

Magazine advertising tends to be restricted to conveying images rather than factual data. However planners already have very positive images of British Columbia. What they need is hard data.

Direct mail is one way to communicate hard information. The difficulty with using direct mail, however, is that meeting planners are inundated with it. While the probability of reading publications from British Columbia might be higher than for other sites, because planners' have indicated a desire to learn about the meeting locations in this province, it is still likely that the impact of a brochure will be very small.

Planners' preferences with respect to the content of direct mail varies. Some, especially those engaged in incentive travel, want the glitzy image type of material, which they then use to sell their own clients but far more frequently planners want hard information. While the Five Senses campaign was generally admired for its tastefulness and attractive images, some planners also noted that it did not supply them with the specific information they feel they need to do their planning. (The objective of the five senses campaign was, however, to create awareness.)

One way of providing hard information along with images is with a videotape. This medium is new enough to attract the attention of most planners (only two percent of planners mentioned this medium spontaneously when asked what are the best ways of communicating to them). When the medium is suggested, nearly all planners react positively suggesting that the tape will be watched. A videotape allows the presentation of hard data, overlaid on images of the location's scenery.

A videotape prepared for San Antonio was especially praised in the focus groups. This tape apparently starts at the airport, where the voice-over tells the viewer the seat capacities of the various airlines serving the city. It then moves into the hotel area, where the meeting room, banquet and sleeping room capacity of each major hotel is communicated, presumably over pictures of the hotel, both exterior and interior. Additional material can easily be imagined. A fact sheet can also be sent out with the video, either to reiterate the information provided on the tape itself, or to supplement it.

The attractiveness of a videotape presentation was determined in the telephone survey. The results appear in the following table.

TABLE C-23
REACTION TO A VIDEOTAPE

Q33. Suppose a videotape were made showing the facilities available in Vancouver which were appropriate to the sort of meeting you had to schedule. It would be accompanied by a short information sheet and sent to you in the mail. Would you rate this as an:

1. Excellent,
2. Good,
3. Only fair, or
4. Poor way to communicate information?

	Western U.S.	Eastern U.S.	Western Canada	Eastern Canada
	(235)	(258)	(55)	(41)
Excellent	39%	51%	34%	34%
Good	39%	31%	46%	32%
Only fair	12%	10%	11%	12%
Poor way to communicate information	10%	8%	9%	22%
	100%	100%	100%	100%

The above figures indicate that planners like the idea of watching a videotape as a means of gathering information about Vancouver. In particular, about 80 percent of the American planners felt that this was either an excellent or a good idea.

In the telephone interview, all respondents who said that their companies did not have a policy forbidding meeting in British Columbia were asked whether they had seen advertising for destinations or facilities in British Columbia. Table C-24 contains these results.

TABLE C-24
ADVERTISING PENETRATION AND MEDIUM

Q28. Next, have you seen any advertising for specific meeting destinations or facilities in British Columbia in the past year?

	Western U.S.	Eastern U.S.	Western Canada	Eastern Canada
	(201)	(214)	(47)	(37)
Yes	67%	58%	83%	95%
No	33%	42%	17%	5%

Q29. Where did you see this advertising?

	Western U.S.	Eastern U.S.	Western Canada	Eastern Canada
	(132)	(117)	(39)	(33)
Direct mail campaign (including "the Five Senses")	28%	23%	23%	24%
Brochures received in the mail	8%	11%	18%	15%
Magazines/other publications	49%	59%	51%	46%
Personal visit in my office	2%	0%	0%	3%
Familiarization trip	0%	0%	0%	3%
Local presentation	5%	2%	5%	6%
Television	5%	1%	0%	0%
From/at other meetings/conventions	2%	2%	0%	3%
Other	3%	3%	3%	0%

The first part of Table C-24 shows that penetration levels for British Columbia advertising are relatively positive. More than half of the American planners recall seeing some advertising for British Columbia locations during the previous year. The same is true of 95 percent of Eastern Canadian planners while 83 percent of Western Canadian planners recall advertising for British Columbia meeting destinations or facilities.

The second part of Table C-24 shows that advertising is seen in magazines far more frequently than in any other medium. Second is direct mail, followed by brochures which, in some instances, can be considered another type of direct mail. No other type of contact is mentioned by more than five percent of the sample.

Familiarization Trips

Meeting planners have two points of view with respect to familiarization trips. On the one hand, they recognize that nothing substitutes for the actual experience of seeing a site. Most planners spend a great deal of their time taking familiarization trips.

On the other hand, the time element is a major difficulty with familiarization trips. Planners in general do not like short familiarization trips, feeling that a day will not suffice to get to know a location. Four days was noted as a good length of time for a familiarization trip, including travel. However, many planners find it difficult to take many four day breaks from their office. The major drawback of the familiarization trip, therefore, is its time inefficiency. No planner can afford to see more than a few sites per year, if each one requires the investment of four days.

Because of the time limitation, fewer than 10 percent of the planners in the telephone interview said that a familiarization trip would be the best way to receive information about British Columbia.

The way familiarization trips are conducted was also discussed at some length in the focus groups. Some planners said that they would not take a familiarization trip sponsored by a hotel, because they are engineered to be sure that no other sites are visited. Other planners disagreed, however, saying that if one wants to, there are ways to see everything one wants to see. Some planners also noted that they object to familiarization trips that involve large groups.

Word-of-Mouth

Planners depend heavily on their professional networks. They discuss their successes and failures with their colleagues and word will spread about a particularly attractive or unattractive site.

The difficulty with word-of-mouth is that it cannot be controlled directly by marketing campaigns, nor will one planner's contribution to the network ever reach more than a very small proportion of all other planners. The way to benefit from this medium is to attract planners to the province and ensure that their experience is positive.

Best Way to Receive Information about British Columbia Sites

Planners in the telephone survey were asked the best way for them to receive information about British Columbia meeting sites and facilities. This information is presented in Table C-25.

TABLE C-25
BEST WAY TO COMMUNICATE WITH PLANNERS

Q32. What is the best way for you to receive information about British Columbia's meeting sites and facilities? [Multiple responses].

	Western U.S. (229)	Eastern U.S. (262)	Western Canada (56)	Eastern Canada (42)
Direct mail campaign	88%	84%	66%	83%
Brochures received in the mail	14%	34%	32%	24%
Magazines/trade publications	12%	16%	18%	10%
Personal visit in my office/direct sales	2%	2%	2%	5%
Familiarization trip	7%	8%	5%	10%
Local presentation	4%	1%	4%	7%
Telemarketing	1%	2%	0%	0%
Trade Shows	2%	0%	0%	7%
Convention bureau	0%	2%	2%	5%
Video	2%	2%	2%	0%
Direct from hotels/kits	0%	2%	0%	0%
Word-of-mouth	1%	2%	0%	0%
Other	7%	8%	7%	7%

This table shows that direct mail is the preferred means of receiving information, by a large margin. Magazine advertising is a distant second, followed by familiarization trips.

In person sales calls are not rated highly for two reasons. First, they are time consuming. Second, most planners in the focus groups said that they resented salesmen who were not prepared and did not know the needs of their organization. This did not seem to be an unusual occurrence.

Local presentations are also not rated highly. Nevertheless, planners attend these functions with some frequency. They have difficulty picking the ones which will be informative, however. Planners tend to view such gatherings as social events rather than as professional activities.

Conclusions and Implications

Communicating to meeting planners is extremely difficult and competitive because of the volume of direct mail which they receive. Many planners say that they will not even read a direct mail piece unless it comes from a location about which they already want information.

British Columbia has an advantage because many planners, especially those from the United States, see the province's destinations positively and would like to learn more about them. However to date planners have received little hard information about British Columbia.

Advertising that gives factual information as opposed to creating awareness is required by the British Columbia meeting and convention industry with direct mail being a major means of conveying this information As mentioned previously, the difficulty with direct mail is that planners receive a large amount of it. The challenge is to ensure that the information specific to British Columbia is digested by planners.

An encouraging form of communicating to planners to achieve this goal is through the use of videotapes. Planners were enthusiastic about the possibilities of this medium. Their only demand was that the tape present an information message, not merely image. It would be helpful therefore to send a separate printed fact sheet with tapes to ensure that the needed information is transmitted.

To promote the province in general as a meeting destination, it may be useful for the Ministry to produce a set of videos. They could share portions referring to the tourist attractions of a given city but may differ in the type of hotel and meeting facility shown. They could also vary in the size of meeting they target or in the location or region they present, such as Vancouver, the interior, resort destinations, etc.

Familiarization trips can also be good medium, once the planners have been convinced to attend. However, consideration should be given to the length of the trip and the size of the group. Planners seem to prefer trips of longer than one to two days and with smaller groups. Planners should also be assured of the opportunity to see a variety of sites.

Advertising in trade magazines should be targeted to those publications read most frequently by planners such as Meetings and Conventions or Successful Meetings magazines.

10. DECISION MAKING PROCESS LEADING TO THE SELECTION OF A MEETING SITE

Reasons for Choosing a Meeting Site

To assist in studying the decision making process undertaken by meeting planners as they choose a site, the telephone sample was asked to provide a list of the reasons they would consider a site for the first time. Table C-26 presents their responses.

TABLE C-26

REASONS FOR SELECTING A SITE FOR THE FIRST TIME

Q31. Why would you consider a city as a meeting site for the first time? [Multiple responses].

	Western U.S.	Eastern U.S.	Western Canada	Eastern Canada
	(198)	(230)	(41)	(35)
Ease of access (location)	34%	23%	54%	20%
Meeting facilities	22%	25%	44%	37%
Accommodation/hotels	19%	16%	22%	29%
Cost factor	17%	18%	15%	26%
Recreational activities	11%	22%	17%	6%
Recommended or chosen by director	12%	11%	7%	26%
Some place different or new	10%	12%	2%	11%
Entertainment/restaurants	7%	12%	7%	11%
Ease of access (airport)	9%	10%	7%	3%
Office location	10%	7%	10%	0%
Business opportunity	7%	4%	5%	0%
Climate/warm weather	5%	10%	0%	0%
Proximity to client base/client request	3%	4%	0%	6%
Specific criteria catering to our needs	5%	4%	0%	3%
Resort area/property	4%	4%	0%	0%
Geography/scenic appeal	1%	2%	2%	6%
Incentive	2%	4%	0%	0%
On rotation basis	3%	0%	2%	3%
Held in major cities (North America)	1%	1%	0%	3%
Other	14%	12%	12%	9%

Based on the telephone survey, the following, in order of importance, are necessary for a meeting site to be considered by a planner for the first time:

- be accessible;
- have adequate meeting facilities;
- have acceptable hotels;
- either be reasonably priced, or offer good value for the money;
- offer good recreational activities;
- be chosen by someone with key management responsibilities such as a company president or director;
- be new and different;
- offer good and varied restaurants and entertainment; and,
- offer good access from the airport.

A similar question was asked of the planners who participated in the focus groups. The answers however emerged in the course of extended discussions. Their list of criteria was as follows:

- ease of access;
- costs;
- local amenities (recreation, nightlife, shopping, tourist activities);
- hotel and staff service;
- adequate size facilities;
- hotel quality; and,
- customs (applies only to Americans planning trade shows).

These lists have strong similarities. The only item which was mentioned by the focus group participants but not specifically by the survey sample was the quality of hotel staff. This was a major issue with focus group participants. It may be however that this was considered part of the total hotel product by those planners taking part in the telephone survey.

The image planners have of the accessibility of British Columbia, and particularly Vancouver, cannot be changed substantially beyond keeping planners informed of improvements in airline scheduling. Also, the decisions of key management personnel are difficult to influence and therefore cannot be addressed directly by the Ministry or industry.

British Columbia meeting sites will vary on how they are rated based on the other criteria mentioned. Vancouver will rate high as, to a lesser extent, will Victoria and Whistler.

To present an effective message to planners both the Ministry and industry in general should be cognizant of the criteria planners use to choose a meeting site.

Role of Personal Experience

Throughout this section of the Meeting Market Study, it was continually apparent that planners place great importance on personal networks with other planners. This message came through especially strong in the focus groups. It has not been pursued extensively in this research because there is virtually no way to exploit the planners' personal networks to communicate information about British Columbia.

The Role of Meeting Type

Purpose of the Meeting

There are clear differences between meetings with respect to their purpose. Types of meetings include academic conferences, instructional meetings, motivational meetings, affiliational meetings (those held to allow people sharing a common interest to come together) and recreational meetings. Frequently meetings feature a mix of purposes.

Meeting purpose will influence the choice of a meeting site. Those who planned academic conferences mentioned that they try to schedule their meetings near a major university, possibly on its campus. Other organizations with bilingual constituencies for example, may choose locations with a "bilingual flavour".

Planners of trade shows are of course concerned that the location of the meeting suit the needs of those displaying their products. This means that trade shows tend to be located in major markets, close either to buyers or sellers or, ideally, both.

Profile of Meeting Attendees

The most important concern of the planner with respect to meeting attendees is whether the meeting is comprised of voluntary attendees or compulsory attendees and, if the latter, whether they are top management or lower down in the organization.

Meetings where attendance is voluntary, such as most association meetings, place a high priority on the attractiveness of the setting and the price of the package. Attractiveness may be defined in terms of the physical surroundings of the location, the activities available at the location and the pre and post trips that can be scheduled. Travel time may be less of a concern depending on the need to attendees arriving and departing on the same day. The key issue is that the meeting site must be attractive to attendees, especially if they are paying their own way.

The attractiveness of a meeting site is less important for those meetings which compel attendance, although planners in this category are still concerned with finding an attractive location. These planners also tend to be very concerned with the quality of the facilities to be used. Since planners' success in their organizations depends on their ability to produce successful meetings, they place emphasis on the attractiveness of the location or quality of the facilities. Such meetings may be planned within a set budget, placing constraints on the choice of meeting site by the planner.

The most demanding type of meeting for the planner is often the small meeting for the top management or corporate board. These attendees usually expect the best. Facilities and hotels must be absolutely first rate and the meeting must proceed smoothly. Such meetings place additional demands on hotel staff as well.

From the planners' point of view, these meetings are often the most important because their professional competence is being judged by the top management in the organization and these same executives are decision makers concerning larger meetings in their organizations. They want to be absolutely sure that the meeting will proceed as planned hence they will look for facilities where this can be assured.

Role of Executive Direction

Directors often determine the choice of a meeting site. The small meetings involving top management are especially susceptible to the influence of directors. Over ten percent of all planners surveyed, and over one quarter in Eastern Canada, say that the reason they would consider a city as a meeting site for the first time is because it is recommended or chosen by a director in their organization.

Conclusions and Implications

In summary, the factors influencing the decision making process of meeting planners is noted below. An ordering of events has been suggested however special cases may result in inversions (i.e. a trade show may look for a convention centre first and use it as the basis for the choice of a city).

The following three factors influence the knowledge a planner will have of a meeting site:

- peers, colleagues;

- advertising:
    - brochures
    - other direct mail
    - magazine advertising; and,

- experience:
    - familiarization trips
    - previous meetings
    - other personal experience.

These three factors result in a planners:

- knowledge of the site; and,
- "image" of the site.

A planner is also influenced by the following factors when determining a meeting location:

- size of group (number of attendees expected);
- place of origin (all from one city or from many cities);
- accessibility of location;
- purpose of meeting;
- previous meeting locations;
- season;
- local amenities (shopping, activities);
- distance from airport;
- cost;
- wishes of membership (easy or hard sell);
- wishes of director; and,
- customs (United States trade shows only).

The choice of the specific hotel or facility within the selected city will depend upon:

- space available:
  - banquet
  - break out
  - congregate
  - guest rooms;

- room block policy (the number of rooms a hotel will block prior to receiving final confirmation of the number of meeting attendees);
- management (for example, willingness to work out a package and continuity of staff from confirmation date to meeting date);
- staff and service;

- quality of facility;
- cost; and,
- proximity to other hotels, convention centre (if more than one facility is required).

Marketing efforts need to address all items on the above list. However, given that the location is chosen first, it is probably most efficient to sell the city first (its location, its total room capacity, its convention facility, its tourist attractions, its restaurants, etc.) before attempting to sell it on the basis of the specific meeting facilities.

11. CONCLUSIONS AND IMPLICATIONS

The meeting and convention market represents a large and important part of the total tourist activity in British Columbia. This survey revealed that planners are responsible for an average of between two and four meetings per month. Each of these meetings attracts between 100 and 150 attendees, on average. This means that each planner is responsible for sending between 2,500 and 7,000 people to meetings each year.

British Columbia attracts just a small proportion of all meetings planned by our respondents. One third of the meetings planned by planners in British Columbia and Alberta are held in the province. One tenth of the meetings planned by Eastern Canadians come to British Columbia. As for meetings planned by United States planners, British Columbia attracts about one in 125 from the Western United States, and about one in 200 from the Eastern United States. Except in Western Canada, planners say that they could bring meetings to British Columbia far more frequently than they do.

Although there are few new organizations in British Columbia and Alberta that can be attracted to hold meetings in the province, the opportunities for expanding British Columbia's share of meetings held by Western Canadian planners is more positive. There is also good potential to attract a greater share of those meetings held by planners from Eastern Canada and the Western and Eastern United States.

SECTION D

MEETING ATTENDEES REPORT

1. INTRODUCTION

One of the main objectives of the British Columbia Meeting Market Study was to collect information about people attending meetings in the province. These people may be British Columbia residents or visitors from outside the province. In either case, information was desired regarding the activities meeting attendees participate in during their stay in British Columbia, the amount of money they spend, the characteristics of their travel and their impression of British Columbia. To this end, a survey of meeting attendees was conducted which involved sampling a selection of meetings held in British Columbia from December 1988 to December 1989.

2. OBJECTIVES

The specific objectives of the meeting attendees survey were as follows:

- to compile a profile of meeting attendees;
- to compile a breakdown of meeting attendee spending; and,
- to assess the economic impact of attendee expenditures.

3. METHODOLOGY

Access was secured to the registration area of each meeting to be sampled. During the registration period, respondents were recruited randomly from among those attending. Before being given a diary, the attendees were screened to make sure they met the criteria of staying overnight, away from home. The screening interview included questions pertaining to origin, size of travelling party and length of stay. (Where applicable, information obtained from the screening interview is shown along with information derived from the returned diaries.)

Attendees were then given a diary and asked to provide information relating to activities and expenditures for each day of their trip in British Columbia. There were also questions regarding the travelling party and other trip characteristics.

To increase the response rate, reminder cards were left in the participants' mail boxes on the day they were given the diary. Diaries were mailed back in a postage-paid envelope after the completion of the trip.

In total, 44 meetings were surveyed and diaries were distributed to 2,088 attendees. There were 925 diaries returned giving a response rate of 44 percent.

City of Meeting

The 44 meetings were surveyed in various locations throughout the province. Since most meetings and conventions held in the province occur in Vancouver, the majority of the sample was drawn from this city.

The sample was stratified to include the four major conference centres in the province, located in Vancouver, Victoria, Whistler and Penticton as well as hotel meeting facilities. Meetings were selected from all 12 months of the year, in approximate proportion to the number of meetings occurring in each month so, for example, more meetings were surveyed in September and October than July and August because a greater number of meetings are usually held at that time of year.

Given these efforts to spread the sample across the population of meeting attendees in British Columbia during 1989, we feel that our sample is reasonably representative of that population. The sampling error for the total sample is no greater than 3.2 percent at the 95 percent level of confidence.

TABLE D-1
CITY OF MEETING *

Vancouver	71%
Victoria	10%
Richmond	1%
Penticton	8%
Whistler	4%
Courtenay	6%
	100%
Base	(925)

* This table represents the percentage of all returned diaries from meetings held in the above cities.

4. DESCRIPTION OF MEETING ATTENDEES AT BRITISH COLUMBIA MEETINGS

Meeting attendees participating in the study were asked to provide certain demographic information relating to origin, age, sex and previous travel activity.

TABLE D-2
ORIGIN OF MEETING ATTENDEES

	All Intercepted Attendees	Attendees Who Returned Diaries
British Columbia	43%	36%
Alberta	7%	6%
Ontario	11%	12%
Other Canada	7%	8%
California	4%	3%
Oregon	2%	2%
Washington	6%	6%
Other Western United States	7%	10%
Eastern United States	10%	14%
Other Countries	3%	3%
	100%	100%
Base	(2,088)	(925)

This table indicates that meeting attendees from British Columbia returned their questionnaires somewhat less frequently than attendees from various other locations. Whereas 43 percent of diaries were given to British Columbia attendees, 36 percent of returned diaries were from British Columbia attendees. The total expenditure estimates presented in this report have been adjusted to take into account the difference in response rates from various regions.

TABLE D-3
AGE OF MEETING ATTENDEES

Under 25	1%
25 to 34	17%
35 to 44	33%
45 to 54	28%
55 to 64	15%
65 and over	6%
	100%
Base	(883)
Median Age	43.7

TABLE D-4
TOTAL FAMILY INCOME OF MEETING ATTENDEES ($CDN)

Under $20,000	6%
$20,000 to $40,000	22%
$40,000 to $60,000	26%
$60,000 or more	46%
	100%
Base	(847)
Median Income	$56,923

TABLE D-5

NUMBER OF TRIPS MADE IN THE PAST YEAR

	Less Than 1,000 Miles	More Than 1,000 Miles
ALL RESPONDENTS		
Business trips	5.0	2.3
Business and pleasure trips	.9	.5
Pleasure trips	2.2	.9
Base = 844		
NON-RESIDENTS ONLY		
Business trips	5.6	3.3
Business and pleasure trips	.9	.6
Pleasure trips	1.8	.9
Base = 526		

TABLE D-6

NUMBER OF TRIPS MADE TO BRITISH COLUMBIA IN THE PAST THREE YEARS (NON-RESIDENTS ONLY)

	Mean Number Of Trips	Percent Taking At Least One Trip
Business trips	.9	25%
Business and pleasure trips	1.1	17%
Pleasure trips	.9	27%
Base = 517		

Conclusions and Implications

People who attend meetings in British Columbia come from a more affluent (median income = $56,923), middle aged (median age = 43.7) segment of society. Forty-three percent are British Columbians, 25 percent come from elsewhere in Canada, 19 percent come from California, Oregon, Washington and other Western United States, ten percent are from the Eastern United Sates and three percent come from other countries, principally the United Kingdom.

As per Table D-5, meeting attendees report that they take about 12 trips per year, on average, of which approximately 25 percent are for pleasure only. Non-British Columbia residents report making about one trip per year (2.9 trips in three years), on average, to British Columbia. However, this is a skewed distribution, since 33 percent of the non-resident attendees report that this is their first trip to the province.

Meetings therefore attract substantial numbers of first time visitors to British Columbia each year. Given the overwhelmingly positive reactions most of these people have to their visit (as discussed later in this report), it is suggested that these individuals be targeted as having a high potential for making a return visit to the province.

5. DESCRIPTION OF THE TRAVELLING PARTY

The meeting attendee diary collected information about the size and age of the travelling party, and the modes of travel used. Table D-7 shows mean party size based on information from both the diary and that collected during the screening interview.

TABLE D-7
NUMBER OF PERSONS IN THE PARTY

	All Intercepted Attendees	Attendees Who Returned Diaries
Mean party size	2.5	2.4
Base	(2,088)	(858)

TABLE D-8
AGES OF PERSONS IN TRAVELLING PARTY (INCLUDING THE RESPONDENT)

Entries are percentages of all travellers.

	Male	Female
Under 15	3%	3%
15 to 18	0%	3%
19 to 24	0%	3%
25 to 34	8%	8%
35 to 44	15%	10%
45 to 54	15%	10%
55 to 64	8%	8%
65 or over	3%	3%
	52%	48%

Base = 824

The mean number of children in each party, as derived from the screening interview, is .5. Information from returned diaries indicates that 50 percent of the people in the travelling party are between the ages of 35 and 54. The distribution of males to females in the travelling party is almost evenly distributed with 52 percent being male and 48 percent female.

TABLE D-9
MAIN MODE OF TRAVEL

	Within British Columbia		
	Residents	Non-Residents	To British Columbia
Own automobile	79%	17%	19%
Rented automobile	3%	31%	5%
Ferry	22%	17%	6%
Bus	6%	24%	2%
Airplane	19%	8%	73%
Cruise ship	*	5%	*
Train	1%	3%	1%
Motor home/camper	2%	2%	2%
Other	9%	36%	2%
	141%	143%	110%
	(330)	(471)	(526)

* Less than one percent.

The mode of travel data also indicates that many visitors from outside the province drive their own automobiles to British Columbia. Of all attendees, 17 percent come from the Western United States (Oregon, Washington and California) or Alberta and 19 percent of attendees originating from these areas drive to British Columbia to attend a meeting.

Conclusions and Implications

Relatively few children accompany meeting attendees on their trip to British Columbia. Ten percent of the travelling parties include a child under the age of 19 and the average number of children per part is .5.

Mode of travel gives an indirect look at some of the spin-off effects of the meeting market. Five percent o the non-residents take a cruise ship during their trip. Thirty-one percent of the non-residents rent a car fo travel within the province, as do three percent of the residents. Twenty-four percent of the non-resident and six percent of the residents use a bus and 17 and 22 percent, respectively, use the ferry system.

The large number of "other" responses given by out-of-province visitors to the question regarding mode o travel within British Columbia probably includes a substantial number who use taxis for local transportatio For example, anyone arriving at the airport and taking a taxi to downtown Vancouver would fall into th category.

6. PRE-TRAVEL DECISION MAKING

Several questions in the diary addressed the way visitors may be influenced in their decision to come British Columbia.

TABLE D-10
WHO MADE THE DECISION TO ATTEND THE EVENT?

	Residents	Non-Residents
Employer or organization	37%	42%
Self	56%	51%
Other, both	6%	6%
	100%	100%
Base	(331)	(554)

TABLE D-11
AWARENESS OF ADVERTISING FOR BRITISH COLUMBIA PRIOR TO THE TRIP
(NON-RESIDENTS ONLY)

Saw no advertising	43%
Saw advertising on:	
Television	22%
Newspaper	15%
Magazine	33%
Other place	9%
Cannot remember where	14%
Base	(533)

TABLE D-12

REQUESTS FOR INFORMATION (NON-RESIDENTS ONLY)

Requested and received information from:	
a travel agent	14%
Tourism British Columbia	7%
the event's organizer	45%
other sources	19%
Base	(594)

Approximately 10 to 20 percent more people, depending on whether they are a resident or non-resident, make their own decision to attend an event rather than the employer or organization. Residents make their own decision to attend an event more often than non-residents.

Meeting attendees receive information primarily from the meeting organizer. Only a small number of people report receiving material directly from a travel agent or from Tourism British Columbia.

Conclusions and Implications

About half of the attendees at meetings in British Columbia made their own decision to attend the event rather than their employer or organization. Although advertising awareness is relatively low, 62 percent of those who made up their own minds to attend the meeting reported seeing advertising for British Columbia, as compared to 51 percent of those who were required to come. Magazines are the most frequently cited medium where there is awareness created by advertising. This information indicates that advertising for British Columbia in general may be an important influencer of an attendees decision to attend a meeting held in the province.

It is evident that one of the best ways to get information about the province to potential meeting attendees is to supply it to the meeting organizers. Since 50 percent of respondents indicated that they made their own decision to attend a meeting in British Columbia, the importance of making sure that attendees receive appropriate information cannot be overlooked.

7. TRIP CHARACTERISTICS

TABLE D-13
MAIN PURPOSE OF THE TRIP

	Primary Purpose	Secondary Purposes
Attend conference or convention	79%	13%
Attend trade show	10%	8%
Attend corporate meeting	1%	4%
Other business	1%	5%
Visit friends or relatives	3%	26%
Touring trip	1%	11%
Exhibition or special event	3%	3%
Resort vacation	1%	3%
City trip	*	7%
Personal matters	*	3%
Outdoors trip	*	3%
Cruise	*	2%
	100%	
Base	(808)	(886)

* Less than one percent.

The distribution of primary purpose of the trip is dependent upon the types of meetings surveyed. Therefore it is important to remember that, for example, the percentage of respondents attending a conference or convention, as compared to a trade show or corporate meeting may be influenced by design effects as well as sampling error.

The following tables pertain to the characteristics of the meeting attendees trip.

TABLE D-14

FIRST VISIT TO BRITISH COLUMBIA (NON-RESIDENTS ONLY)

First visit	35%
Base	(554)

TABLE D-15

MAJOR TRIP DESTINATION

British Columbia	98%
Elsewhere	2%
	100%
Base	(551)

TABLE D-16

LENGTH OF TRIP BEFORE ENTERING BRITISH COLUMBIA (NON-RESIDENTS ONLY)

Mean number of nights away from home prior to entering British Columbia	1.4
Percent travelling directly from home to British Columbia	69%
Base	(487)

TABLE D-17

TOTAL LENGTH OF TRIP

Mean number of nights away from home	6.2
Base	(848)

TABLE D-18

LENGTH OF TRIP IN BRITISH COLUMBIA

	All Intercepted Attendees	Attendees Who Returned Diaries
Mean number of nights spent in British Columbia	4.8	4.9
Base		(875)
Mean number of nights spent at meeting	3.7	
Mean number of nights spent on pre or post trips	1.1	
Base	(2,088)	

Conclusions and Implications

Ninety percent of the respondents in the survey considered that attending a conference, convention or trade show or a corporate meeting, or dealing with other business was the primary purpose of their trip. Although the event itself may be the primary purpose of the trip, a range of secondary purposes were noted, the most prevalent being to visit friends or relatives. This suggests broad opportunities to sell other activities, either during the duration of the meeting or as a pre or post meeting activity.

Opportunity exists with the 35 percent of the sample who come to British Columbia for the first time. With appropriate marketing, these people could produce considerable numbers of return visits.

We also note that 31 percent of the sample spends time outside British Columbia prior to their arrival. It may be possible, with appropriate marketing, to attract a larger proportion of these pre-trips to the province.

Finally, each party coming to British Columbia to attend a meeting spends an average of 1.1 days on a pre or post trip. These individuals represent an enormous marketing opportunity for all components of the tourism industry in the province.

8. REACTIONS TO BRITISH COLUMBIA

Reactions to British Columbia were captured in a question asking those who had experience with othe meeting sites to compare it to their British Columbia experience.

TABLE D-19

COMPARISON OF BRITISH COLUMBIA TO OTHER MEETING SITES

British Columbia is:

Much better	42%
A little better	24%
About as good	31%
A little poorer	2%
Much poorer	1%
	100%
Base	(741)

TABLE D-20

LIKED BEST ABOUT THE BRITISH COLUMBIA LOCATION

Location: generally positive	16%
Beautiful scenery/natural surroundings	16%
Meeting facilities: generally positive	12%
Friendly, hospitable people	12%
Beautiful, quaint, quiet city	8%
Climate, weather: positive	8%
Location: close to other places/things	8%
Clean, safe city/streets	7%
Accommodation: generally positive	7%
Diversity of recreation/entertainment nearby	5%
Location: waterfront	4%
Good service	3%
Good food/restaurants	3%
City atmosphere, unique buildings	2%
Accessibility, easy to get around	2%
Good transportation/parking	2%
Location: all facilities on one site	1%
Clean air	1%
No response	25%
Base	(925)

TABLE D-21

LIKED LEAST ABOUT THE BRITISH COLUMBIA LOCATION

Nothing, no complaints	11%
Climate, weather: negative	8%
Costs: general	6%
Convention facility: general negative	5%
Difficulty of reaching location	3%
Traffic	3%
Higher cost of food/liquor	3%
Parking: general negative	3%
Highways and transportation: general negative	3%
Accommodations: general negative	2%
Noise/congestion/construction	2%
Poor service	2%
Accommodation: costs	2%
No response	48%
Base	(925)

TABLE D-22

RATINGS OF THE EXPERIENCE IN BRITISH COLUMBIA GENERALLY

Generally positive comments	37%
Enjoyed it	7%
Friendly, hospitable people	6%
Been before/will come again	5%
Generally negative comments	4%
Live here and love it	4%
Beautiful scenery/natural surroundings	4%
Beautiful city/province	3%
Climate, weather: negative comment	2%
Clean city/streets	1%
Climate, weather: positive comment	1%
Good service	1%
No response	39%
Base	(925)

Conclusions and Implications

Meeting attendees response to British Columbia reveals the strong positive impression that British Columbia and the meetings and convention industry makes on those who attend meetings here. While the setting ranks first among the things people like about coming to British Columbia, facilities and service are also singled out for positive comment.

Conversely, issues pertaining to costs, climate and traffic were noted as being least liked about the British Columbia location. However, the percentage of people who express unhappiness of any kind is small compared to those who give positive feedback. While 25 percent of the sample gave no response to the question asking what they liked the best, 59 percent failed to answer the question about what they liked the least. The negative aspects noted about the trip to British Columbia, specifically problems with customs and the weather, are mentioned by only a small fraction of respondents.

While Vancouver may be more expensive than other British Columbia locations, it is reasonably priced, particularly for accommodation, in comparison to other major North American cities. Such information should be communicated to meetings attendees through their organizations, prior to their arrival in the province.

Traffic congestion and some issues pertaining to transportation are not directly controllable by the meetings and convention industry. However, assuring that attendees are well informed about site locations and are provided with taxi service or parking as required when they are here might alleviate problems.

Overall, British Columbia seems to leave a positive impression in the minds of meeting attendees indicating the potential for favourable word-of-mouth advertising. Although the effect of word-of-mouth advertising cannot be quantified, its impact cannot be overlooked.

TABLE D-23

DAILY EXPENDITURES BY TYPE AND DAILY TOTAL EXPENDITURES

Accommodation	$85.25
Auto transportation	$9.14
Other transportation	$7.10
Meeting or package *	$20.70
Restaurants	$40.85
Groceries/beverages	$5.86
Recreation	$2.51
Entertainment	$4.63
Shopping/souvenirs	$24.28
Other	$3.34
TOTAL	$203.66
Base	(876)

* Category used when a fixed price was paid for a combination of services (eg. hotel and food).

TABLE D-24

DAILY EXPENDITURES BY TYPE AND DAILY TOTAL EXPENDITURES BY REGION OF ORIGIN

	Western Canada	Eastern Canada	Western United States	Eastern United States
Accommodation	$64.82	$102.14	$84.27	$100.58
Auto transportation	$9.37	$10.38	$7.94	$7.45
Other transportation	$7.32	$8.39	$2.28	$7.03
Meeting or package	$22.92	$23.60	$29.54	$13.78
Restaurants	$37.90	$56.10	$33.26	$40.63
Groceries/beverages	$7.17	$6.10	$4.41	$4.57
Recreation	$1.68	$4.45	$2.19	$2.31
Entertainment	$4.90	$5.47	$4.63	$4.19
Shopping/souvenirs	$21.54	$38.43	$18.55	$19.38
Other	$3.86	$3.49	$3.43	$2.88
TOTAL	$181.48	$258.55	$190.50	$202.80
Base	(368)	(175)	(97)	(172)

TABLE D-25

DAILY EXPENDITURES BY TYPE AND DAILY TOTAL EXPENDITURES, BY SEASON

	January to March	April to June	July to September	October to December
Accommodation	$76.74	$94.62	$74.31	$86.20
Auto transportation	$8.39	$7.91	$9.07	$4.35
Other transportation	$5.96	$7.76	$5.90	$9.41
Meeting or package	$20.50	$23.01	$16.20	$24.68
Restaurants	$46.97	$43.34	$33.34	$42.75
Groceries/beverages	$7.44	$5.70	$5.11	$6.32
Recreation	$1.75	$3.46	$2.48	$.92
Entertainment	$3.94	$5.11	$4.62	$4.85
Shopping/souvenirs	$22.69	$25.39	$18.78	$33.76
Other	$2.99	$3.22	$4.43	$3.02
TOTAL	$197.37	$219.52	$174.24	$216.26
Base	(143)	(407)	(188)	(123)

TABLE D-26
DAILY EXPENDITURES BY TYPE AND DAILY TOTAL EXPENDITURES, BY ACTIVITY

	On Days When Participating in Meeting, Convention or Trade Show	On Days When Not Participating in Meeting, Convention or Trade Show (i.e. on Pre or Post Trips)
Accommodation	$99.83	$55.50
Auto transportation	$5.60	$12.44
Other transportation	$6.82	$7.95
Meeting or package	$27.02	$5.98
Restaurants	$46.30	$31.56
Groceries/beverages	$6.34	$5.21
Recreation	$2.16	$2.79
Entertainment	$5.39	$3.29
Shopping/souvenirs	$23.39	$26.79
Other	$3.81	$2.51
TOTAL	$226.67	$154.02
Base	(584)	(291)

TABLE D-27
EXPENDITURES PER TRIP AND PER CAPITA

Average daily expenditure per party	$203.66
Average length of trip (in British Columbia)	4.8 nights
Average total expenditure per party	$977.57
Average party size	2.5 persons
Average daily per capita expenditure	$81.46

TABLE D-28

ACTIVITIES

Table entries represent the proportion of the total number of visitor days spent in each of the activities.

Attended:	
Conference/convention	62%
Corporate meeting	3%
Trade show	11%
Sporting event	2%
Festival/cultural/special event	7%
Activities:	
Shopping	32%
Took a tour	9%
Sightseeing	27%
Travelling/passing through	6%
Conduct business	26%
Hunting	*
Fishing	*
Other outdoor activities	5%
Skiing	1%
Golf	2%
Fitness	6%
Other sporting activities	1%
Nightlife	23%
Visited:	
Beach/lake shore	12%
Museum	8%
Fair/amusement park	2%
Garden/park	14%
Visit friends/relatives	17%
Base	(925)

* Less than one percent.

TABLE D-29

ACTIVITIES, BY WHETHER RESPONDENT WAS ATTENDING MEETING OR CONVENTION, OR ENGAGED IN PRE OR POST TRIP

Table entries represent the proportion of the total number of visitor days spent in each of the activities.

	Attending Meeting or Convention	On Pre or Post Trip
Attended:		
Sporting event	*	5%
Festival/cultural/special event	5%	11%
Activities:		
Shopping	32%	30%
Took a tour	10%	9%
Sightseeing	24%	32%
Travelling/passing through	3%	10%
Conduct business	36%	6%
Hunting	*	*
Fishing	*	1%
Other outdoor activities	3%	8%
Skiing	*	3%
Golf	1%	3%
Fitness	6%	4%
Other sporting activities	1%	2%
Nightlife	26%	16%
Visited:		
Beach/lake shore	10%	16%
Museum	8%	8%
Fair/amusement park	2%	2%
Garden/park	13%	15%
Visit friends/relatives	12%	25%
Base	(584)	(291)

* Less than one percent.

Attendees were asked to allocate expenditures among ten different categories. Accommodation claims the largest share of expenditures, with an average of $85.25 per day, or 42 percent of total expenditure. Restaurants are ranked second with an average daily expenditure of $40.85, or 20 percent of the total.

An average of $20.70 per day, or ten percent of the total is spent on meeting packages, packaged tours and cruises. Since meeting packages generally include room and often food (along with the registration fee for the meeting), the averages for accommodation and restaurants may be a minimum figure. A percentage of the $20.70 spent on packages per day could be added to the accommodation and restaurant figures. Unfortunately the data gives no indication of what this percentage may be.

Transportation is the next biggest expense for the meeting attendee. Attendees spend $9.14 per day on auto transportation and $7.10 per day on other transportation. The total of $16.24 is eight percent of the total daily expenditure.

The table of expenditures by region of origin shows that Eastern Canadian meeting attendees have the highest daily expenditure ($258.55 per day). They are followed by Eastern Americans, Western Americans and Western Canadians.

Eastern Canadian meeting attendees spend more money than the rest of the respondents in the restaurant and shopping categories. Eastern Canadians spend $56.10 on restaurants compared to Eastern Americans at $40.63. Likewise, Eastern Canadians spend an average of $38.43 on shopping and souvenirs compared to an average of $21.54 by Western Canadians.

The average expenditures of Western Canadian meeting attendees is less than the rest of respondents and is likely due to lower accommodation costs, $64.82 compared to an average of $85.25 for the total sample.

There are also seasonal differences in expenditures. The April to June and October to December periods are characterized by higher than average expenditures, compared to the other seasons. The reader should note, however, that because only 44 meetings were sampled, with an average of eleven in each season, seasonal differences may be due to sampling error.

The average party spends 4.8 nights in British Columbia. During this time period 1.1 nights, or 23 percent, are spent either in a pre or post trip (not including the 1.4 days spent on a trip prior to entering British Columbia).

Expenditures during the meeting portion of the trip are significantly higher than they are during the pre and post trip segments. Expenditures are larger in nearly every category, especially accommodation, meeting packages and restaurants. Conversely, visitors spend more on a pre or post trip in the areas of auto transportation, other transportation, shopping and souvenirs.

In addition to expenditure information, meeting attendees were also asked to indicate which of 23 activities they engaged in on each day of their stay. Activities vary between those engaged in during the course of a meeting as opposed to during a pre or post trip. During the days when they were attending meetings, our respondents were more likely to be conducting business or participating in nightlife, compared to the days spent in pre or post trips where they were more likely to attend festivals, special or cultural events, engage in sightseeing, travel, or visit the beach or lake shore and friends or relatives.

Conducting business is done on 36 percent of the days when respondents are attending meetings compared to six percent on non-meeting days. The time spent on sightseeing rises from 24 to 32 percent, on travelling or passing through from three to ten percent, on visiting friends and relatives from 12 to 25 percent and on visiting the beach or lake shore from 10 to 16 percent. All other activities change relatively little between days spent in meetings as opposed to pre and post trip.

Economic Impact of the Meeting Market

A substantial amount of money is spent by meeting attendees in the province. The average total expenditure per meeting attendee travelling party in 1989, as derived from this study, is $977.57. It is difficult, however, to estimate with certainty the total average expenditures made by all meeting attendees in the province over the course of a year without information regarding the volume of meeting attendees and the annual number of meetings held in the province. The Market Profile questionnaire sent to all meeting facilities in the province able to handle meetings of over 100 attendees requested this information. Due to the low response to this questionnaire, a precise estimate of the total number of meetings held in the province or the number of attendees at these meetings cannot be derived at this time.

Instead, four key meeting centres have been used to estimate the economic impact made by meeting attendees in the province. The four centres were chosen because representative delegate information could be obtained for each centre and, it was possible, based on information derived from this study, to produce the average expenditures for three of the four centres (Vancouver, Victoria and Whistler).

The following represents an estimate of total annual expenditures by convention/meeting delegates in 1989 in the Greater Vancouver Regional District, and at the Victoria Conference Centre, the Whistler Conference Centre and the Penticton Trade and Convention Centre. The expenditure data refers to all days spent in the province by the travelling party.

Depending on the manner in which delegate information has been supplied, a figure of average tota expenditure per party or average daily expenditure per party has been used. If the total number of delegates has been supplied, then the average total expenditure per party has been used to take into accoun expenditures per day over the time period the travelling party was in the province. However, where a figure of total delegate days has been supplied, as in the case of the Whistler Conference Centre and Penticton

Trade and Convention Centre, the average daily expenditure has been used because the time frame in which the delegate was in the province has already been taken into account in the delegate days calculation (number of delegates multiplied by number of days). It should be noted that this second form of calculation may under represent total expenditures since the delegate days figure does not take into account pre and post meeting trips.

It should also be noted that a percentage of the total number of meeting attendees will be people who may choose not to pay for accommodation while attending a meeting because they live in the city in which the meeting is held. Consequently, per party expenditures would be less. Only those people staying overnight away from home, were included in the study meeting attendee sample.

Since the number of attendees per travelling party is unknown, a range of total expenditures must be calculated assuming that there is either one or two meeting attendees per party and, as per the screening interview, .5 children per travelling party. The two adults in the travelling party may be either one attendee who, for example, is accompanied by a spouse, or two attendees that share a room and assume that their travelling party includes their room partner(s). It is, however, likely that the following estimates are in the higher range, based on the assumption that most attendees interpreted "immediate travelling party" to mean themselves and other non-attendees accompanying them.

Greater Vancouver (includes Vancouver and surrounding municipalities):

Average Total Expenditure Per Party, Per Trip for Vancouver = $1,119.96

1989 Total Number of Delegates
(Source: Tourism Vancouver) = 217,460

The total estimated expenditures by delegates/attendees in Vancouver in 1989 ranged from $121,773,251 to $243,546,502.

The following expenditure calculations for the Victoria Conference Centre, the Whistler Conference Centre and the Penticton Trade and Convention Centre refer only to meetings held at those centres and not to meetings held elsewhere in their respective communities. Delegate figures in general for each of the respective communities is not available.

Victoria Conference Centre:

Average Total Expenditure Per Party, Per Trip for Victoria = $729.41

1989 Total Number of Delegates - Multiple Day Events = 24,140
(Source: Victoria Conference Centre)

The total estimated expenditures by delegates/attendees at the Victoria Conference Centre in 1989 ranged from $8,803,979 to $17,607,957.

Whistler Conference Centre:

Average Daily Expenditure Per Party, Per Trip for Whistler = $159.55 per day

1989 Total Delegate Days = 104,009
(Number of Delegates Multiplied by Number of Days)
(Source: Whistler Conference Centre)

The total estimated expenditures by delegates/attendees at the Whistler Conference Centre in 1989 ranged from $8,297,318 to $16,594,636. As mentioned previously, since the delegate days figure does not include pre and post meeting activity, this estimate of expenditures should be viewed as conservative.

Penticton Trade and Convention Centre:

Average Daily Expenditure Per Party, Per Trip for Province	=	$203.66
1989 Total Delegate Days (Source: Penticton Trade and Convention Centre)	=	83,000

The total estimated expenditures by delegates/attendees at the Penticton Trade and Convention Centre in 1989 ranged from $8,451,890 to $16,903,780. As with the previous range of expenditures for Whistler, this estimate should be viewed as conservative since the delegate days figure does not take into account pre and post meeting activity.

These four centres represent a range in total expenditures by meeting attendees in 1989 of $147,326,438 to $294,652,875.

As mentioned previously, it is difficult to estimate meeting visitor expenditures on a provincial basis with certainty because the total number of delegates for the province is not known. The Meetings and Incentive Travel Department of the Ministry of Tourism estimates that these four centres represent approximately 75 percent of the meeting business in the province. Based on this estimate, the total provincial meeting visitor expenditures in 1989 can be approximated to range from $196,435,251 to $392,870,500.

Total expenditures by meeting attendees represent a direct impact on the economy. This impact is however only part of the economic impact resulting from the meeting market. There are other direct and indirect revenues that also have a positive effect on the economy. The direct impact of the meeting market includes any gross revenues attributed to meeting attendees or planners. Therefore an item such as rental of the meeting facility would be part of the direct impact of the meeting market. Gross revenues are then distributed through the economy in such form as wages and salaries and the purchase of goods and services. Indirect revenues would include items such as expenditures made by the meeting facility, hotel, etc. to service a meeting, such as payment to local suppliers.

Research conducted for this study only allows for an estimate of one part of the total economic impact of the meeting market, albeit a significant part. It must, however, be kept in mind that there are other direct and indirect benefits of the meeting industry that cannot be measured as part of this study. This does not however lessen their importance to the economy.

The average expenditure information derived from the meeting attendees survey will be useful in assisting individual communities in estimating the impact of meeting business. If the number of meeting attendees is known for a community or particular facility, the provincial average expenditure figure per travelling party (or, if appropriate, the specific expenditure figures for Vancouver, Whistler and Victoria as noted above) can be used to estimate total expenditures by meeting attendees. It should be noted however that this expenditure information is for multiple day meetings and does not take into account the effect of day usage of meeting facilities, such as banquets.

10. CONCLUSIONS AND IMPLICATIONS

The information received from meeting attendees indicates that the British Columbia meeting product is positively received. The location and beautiful scenery rank first among the factors liked best about British Columbia with meeting facilities and service also leaving a strong positive impression. This indicates potential both for repeat visitation of attendees and strong word-of-mouth advertising by meeting planners.

The estimates of total expenditures by meeting attendees and their travelling party indicates that the meeting industry has a substantial impact on the provincial economy. There is good potential to improve this economic impact through marketing efforts to increase pre and post meeting activity as well as through a general increase in meetings attracted to the province. Opportunities of note are as follows:

- spending during pre and post meeting trips is considerably less than during the convention or meeting itself. Efforts to market pre or post meeting packages might result in larger expenditures, as more extensive soft adventure packages become available in the province and if visitors are encouraged to spend some of the time now spent outside British Columbia, within the province;

- very little is spent on entertainment and recreation, just over two percent and one percent respectively of the average daily expenditure. These categories should be addressed and promoted in marketing information supplied to meeting planners. Even though entertainment and recreation are often included as part of a meeting and not payed for separately by attendees, there is opportunity to increase expenditures in these categories during pre and post meeting trips. In general, regardless of the activity i.e. sightseeing, skiing, etc., offering specific products to meeting visitors might result in increased expenditures in these categories;

- American meeting attendees spend less on average during their visit than Eastern Canadian attendees. This is largely due to lower expenditures on hotels, restaurants and shopping/souvenirs. Increasing the awareness of Eastern American attendees with respect to the facilities and amenities available at their meeting destination may result in increased expenditures; and,

- finally, people who have visited British Columbia for a meeting usually take home a very positive image of the province. These individuals should be targeted by follow-up marketing to encourage return visits.

SECTION E

FUTURE INITIATIVES

1. INTRODUCTION

The intent of this section of the British Columbia Meeting Market Study report is to identify those issues of importance arising from the study research and to propose initiatives to be addressed by both the Ministry of Tourism and the industry in general. Some initiatives refer to a specific action that should be taken whereas other initiatives refer to a change or reassessment of attitude on behalf of the industry and government.

This study was divided into three phases; the Product Inventory and Market Profile Report, the Meeting Planners' Survey and the Meeting Attendees Report. The following analysis combines these three phases, identifying issues pertaining to both product and market development. The ordering of the initiatives does not represent priority.

Prior to presenting the initiatives however, it is first useful to discuss those issues which could influence the environment for product and market development.

2. ISSUES POTENTIALLY IMPACTING MEETING BUSINESS

The potential to attract meeting business or for the development of new facilities may be impacted by a number of issues. The more salient issues are as follows:

- Goods and Services Tax (GST) - The impact the GST will have on the tourism industry is, as yet, unknown although some industry professional suggest that the GST will have a negative impact on the tourism industry, particularly in attracting business from out-of-country. This factor may have a significant impact on British Columbia's ability to increase its market share of meeting demand from the United States market;

- Economy - Meetings are often a discretionary cost for organizations and associations. As such, they are often the first item to be cut or downsized when the economy weakens. Therefore if the economy does experience a downturn, planners from outside British Columbia may be less likely to hold meetings in British Columbia and may choose a location closer to home.

  Changes to the economy also have significant impact on the rate of development of new facilities and the maintenance, upgrading or decline of existing facilities. As the meeting product ages without refurbishment or additions, so too does its ability to attract new business;

- Land Values - Changes in land values have implications for the development of new meeting facilities and ancillary activities such as attractions. Vancouver, in particular, has been affected by high land values. The development of new facilities becomes a longer term investment of little appeal or, alternatively, developments other than tourism product are the highest and best use for sites;

- Competitive Development Outside British Columbia - British Columbia meeting facilities are in competition with facilities outside the province for meeting demand, particularly for out-of-province business. The industry must be aware of the changes to competitive supply. It is however, the major urban centres such as Vancouver, Toronto and Montreal that compete for meeting business because smaller centres attract most of their meeting business from local and regional groups;

- Government Policies - Changes to government policy both within and outside the province can significantly impact meeting demand. A good example of this is the GST mentioned previously. The industry must be aware of changes to government policy and work as a cohesive group in order to make effective representation.

  The industry must also be aware of changes to government policy in the United States. For example, the United States at one time had a policy eliminating the tax deductible status of conventions held outside the United States. This policy negatively impacted the ability of Canada, to attract meeting business from the United States.

3. PRODUCT AND MARKET DEVELOPMENT

3.1 Create a strategy plan for the meeting industry on a provincial, regional and community basis.

To successfully capture meeting demand or increase market share, it is imperative that the Ministry of Tourism, working with industry, assess the potential various locations and facilities have to attract different types and sizes of meetings. This assessment will form the basis of a strategy plan for the meeting industry. As the first step in this regard, a detailed inventory of the meeting product available in various areas (discussed further in 3.3) has partially been created by means of the Product Inventory information compiled as part of this study. (This information will be combined with existing information by the Meetings and Incentive Travel Department to create the most up-to-date inventory available.)

The second step is to develop a short-term marketing plan focusing on those meetings offering the best potential given the current meeting product available in a community. For example, if a community has a large supply of budget accommodation and a large multi-purpose building, it may be ideally suited to cater to large, budget conscious organizations. Over the short-term, immediate product issues such as the need to refurbish facilities, better signage, etc. should also be addressed.

The third step is to create a plan of action to address long range product and market development issues, which will vary from community to community. The two key issues pertain to future markets that may offer potential and new product to be developed.

3.2 Create a cohesive working relationship amongst all elements of the meeting product.

Communities and representatives of individual meeting facilities must be aware of and work with all elements of the meeting product, which include the accommodation, attractions, activities, transportation and other amenities and services that are offered in the community to meeting planners. To successfully attract meeting demand, issues relative to the meeting product such as the need for upgrading of facilities, pricing, new product development, etc. must be addressed. A framework should be established whereby issues pertaining to the meeting product are assessed on an ongoing basis. Those areas in which the meeting product is deficient can then be addressed on a community, regional or provincial basis i.e. guest and meeting room supply is of a poor quality, local attractions are not being promoted and developed, access is poor, etc. The Ministry of Tourism could act in a coordinating role in this regard, assisting the community and/or region in assessing their meeting product and addressing those issues that must be dealt with on a provincial basis such as transportation and access.

Access, in particular, is a primary concern for meeting planners. Therefore the transportation infrastructure in/out of communities and to/from facilities is one element of the meeting product that must be addressed on an ongoing basis. Issues concerning capacity at the airport or highway access need to be dealt with if a community expects to attract significant out-of-town meeting demand.

3.3 Address the necessity for a consistent, up-to-date inventory of meeting facilities.

To effectively market the province as a meeting destination, and to supply industry with current information regarding the British Columbia meeting product, it is necessary to have an up-to-date inventory of the meeting facilities available in the province. To a certain extent, the necessity for current information has already been addressed through information received from the Product Inventory questionnaire. However, it is critical that the inventory be as complete and up-to-date as possible therefore it is essential that any gaps in information be addressed and that the inventory be updated on a regular basis.

Up-to-date product information is the one of the best marketing tools. However, to continuously have this information available however, requires a concerted effort on behalf of the industry to update the Meetings and Incentive Travel Department of the Ministry of Tourism regarding new meeting facilities or additions to existing meeting facilities. Since planners are concerned with more than facility capacity when choosing a meeting site, it is best to present the most detailed information available about a meeting facility and ancillary amenities in a community, information that was gathered by means of the Product Inventory questionnaire.

It would be beneficial for the Meetings and Incentive Travel Department to make this information available in a published form, similar to the Convention and Meetings Guide, categorized by community and noting important area demand generators and entertainment venues such as local attractions as well as the number and capacity of meeting rooms. The information in this publication could also be made available on computer disk.

3.4 Address the potential for new product development.

There are positive implications evident for product development in major cities such as Vancouver and Victoria. Due to their superior inbound access in relation to other British Columbia destinations, these two cities have the greatest potential to benefit from an increase in meeting demand from non-provincial meeting business. As demand for meeting space increases, provincial association and corporate meeting business may choose to hold meetings elsewhere in the province, specifically in those communities surrounding or in close proximity to Vancouver and Victoria.

Substantial population growth in Greater Vancouver (Richmond, Surrey and Coquitlam) and a trend towards relocation of companies to outlying communities also indicates a positive environment for development of new meeting facilities in the area. Meeting business created by growth in local markets may not necessarily be overnight meeting business. As local markets grow, so does the demand for single day usage, i.e. banquets, luncheons, etc.

From a demand perspective, potential for the development of new meeting facilities in certain markets exists. However it must be noted that the decision to build new meeting facilities should be based on much more information than can be gathered from this study. Issues such as development costs, demand for ancillary facilities (i.e. hotel rooms if meeting facility is part of a hotel development), state of the economy, etc. would also need to be addressed.

3.5 Address the necessity for upgrading existing meeting facilities.

To remain competitive, it is necessary for meeting facilities to be upgraded on a continual basis. Accommodation properties tend to upgrade guest rooms before meeting facilities since they are usually the primary revenue generator. However to retain or increase market share, meeting facilities must also be upgraded, particularly if new, competitive facilities are entering the market.

Furthermore, marketing of the meeting facilities or the meeting product in general should reflect any upgrading that has taken place. Management of the meeting facility should inform those organizations marketing on behalf of the community of upgrading, such as regional tourism associations and the Ministry of Tourism.

3.6 Address the market potential of the resort meeting product.

Although resorts are usually less accessible than urban locations, it is the remoteness of their location that is often their primary feature for attracting meeting business. Access may be less of an issue for a meeting planner given the appeal of a particular resort. Pannell Kerr Forster research indicates that the smaller, retreat type meeting has become a growing market in North America, indicating potential to increase meeting business at existing resorts in the province. Marketing resorts separately is, however, costly thus resorts affiliated with internationally and nationally recognized chains will likely realize results most easily. Independently operated resorts would benefit from cooperative advertising and promotion to attract this business, significantly reducing individual marketing costs.

3.7 Encourage the development of a uniform system of recording data regarding the meeting market that can be used by any facility.

The low response to the Market Profile questionnaire indicates that meeting facilities do not keep reliable records regarding their meeting market or do not keep the information in the form or detail requested. Although some major hotel companies keep data according to their own system, the industry in general would benefit from developing a uniform system of recording information, on an individual property basis, pertaining to the meeting market. It is envisioned that this system, similar to the internationally utilized Uniform System of Accounts for Hotels, would provide a reference to meeting facilities setting up or revising their systems on how to record data regarding meeting business consistent with industry standards. In future then it would be possible to obtain comparable information on a community, regional or provincial basis on the status of the meeting market. Confidentiality can be maintained if information is aggregated by an independent third party.

3.8 Address the necessity for projected information on meeting business.

This initiative has three components, as follows:

3.8.1 To more efficiently and effectively market meeting facilities to potential meeting planners, it would be beneficial to have knowledge of the rotation schedule of meeting bookings. For example, if a Western Canadian association rotates meetings between provinces on an annual basis, it would be helpful to know when British Columbia will next have the opportunity to host a meeting. Marketing to this association can then be employed at the most effective time.

The coordination of retrieving and disseminating this information would need to be addressed by the Meetings and Incentive Travel Department of the Ministry of Tourism.

3.8.2 It would be beneficial if future convention and meeting bookings for a community were made available in published form. This would alert the local tourism industry to opportunities with upcoming meetings and educate the community in general with regard to the impact of the meeting industry.

3.8.3 Following from the previous point, local and regional tourism marketing groups would also find it useful to know the number of guest room bookings expected from upcoming meetings. This would be of assistance in deciding whether or how to adjust the marketing plan on a short-term basis. For example, if it were known that most guest rooms in a community were pre-booked over a specific period for upcoming conventions and meetings it would affect the short-term marketing plans at the local community level.

3.9 Target meeting business from outside Western Canada.

The greatest potential for increasing the size of the meeting and convention market lies with planners from outside Western Canada.

Marketing activities should target repeat business from outside Western Canada and attract new organizations to British Columbia for the first time. The American market, in particular, holds good potential due to the vast size of the market in comparison to that of Canada.

3.10 Market Vancouver and Victoria throughout Canada and the United States.

There is a good potential to increase meeting business for Vancouver and Victoria. They are both popular locations with meeting planners. Vancouver and, to a lesser extent, Victoria are well known to planners throughout North America.

Due to the insufficient number of airline routes serving Vancouver from many American cities, efforts should not be concentrated on very large meetings which require large numbers of attendees to arrive at the same time. It should be kept in mind however that some organizers of many large meetings perceive greater access problem in reaching Vancouver and Victoria than actually exists.

3.11 Emphasize factual information about Vancouver and Victoria.

The message relayed to Western American meeting planners does not need to emphasize name recognition or basic awareness. These individuals already know that Vancouver and, to a lesser extent, Victoria exist and they have a positive image of these locations.

While both Canadian and American meeting planners rate Vancouver very high on their list of preferred Canadian locations, only the Canadian planners are familiar with the City's facilities and tourist attractions. Eastern American planners, in particular, have very little familiarity with what the City has to offer. This is also evident when planners are asked about cities other than Vancouver.

Marketing should emphasize hard data about facilities and tourist activities. Planners are already interested in Vancouver and Victoria. They now need to be convinced that these cities are capable of handling their needs.

There are plans, either rumoured or proposed, for the addition of 2,000 new hotel rooms in the Lower Mainland in three separate luxury hotel developments. With recent hotel developments and renovations, as well as the opening of the Victoria Conference Centre, Victoria now has an adequate supply of luxury hotel rooms and good quality meeting space to support the meeting market. This information should be communicated to meeting planners. Many planners said they are pleased with the image of these locations, however they require more factual information.

3.12 Market other British Columbia locations primarily in the Pacific Northwest.

Awareness of smaller British Columbia locations other than Victoria and Vancouver is greater among Western Canadian planners, and accessibility is less of an issue. Marketing to planners from more distant locations would have to achieve name recognition in addition to transmitting detailed information about a given location.

Marketing of the smaller centres (other than resorts) by local and regional tourism associations and the provincial government should not be directed to Eastern American planners due to greater difficulty in accessing these sites. Marketing of the smaller British Columbia meeting locations should focus more on Canadian planners, especially those in the west, and planners in the state of Washington. It is unlikely that marketing directed more broadly than this will be effective because these locations tend to attract smaller meetings whose attendees do not typically travel far from home. An exception would be for luxury class destination resorts which can compete effectively for smaller corporate meetings from Eastern Canada and the United States.

3.13 Consider the use of videotapes as a form of direct mail marketing.

3.13.1 Meeting planners agree that the best way to receive information about a site is by direct mail. The task of the direct mail marketer is to ensure that the information is read. Most planners say that they receive a large amount of mail and, unless they have a specific reason to read a particular piece of mail, it is thrown away.

To ensure that direct mail is a beneficial form of advertising, it is recommended that videotapes be developed. The use of videotapes as a marketing tool received a positive response from meeting planners. Planners want to know, for example, how many airline seats arrive in Vancouver in a day, how many rooms can be set aside for a meeting in the hotels, how many break out rooms there are, how large the banquet facility is, and so on. This data can be accompanied on a videotape by visual representations of the facilities being discussed. While the production of a videotape would be expensive, due to its uniqueness, it would ensure that a greater audience would be reached than through the use of other types of marketing. An information sheet or computer disk containing factual information should accompany the videotapes. This can then be used as a quick reference by planners.

3.13.2 The Ministry of Tourism, regional and local tourism and convention marketing associations, and the industry in general should work together, in a cooperative marketing effort, to create these videos.

The subject of the videos will vary depending on the origin and type of meeting to be targeted. For example, videos could be prepared that focus on major cities such as Vancouver and Victoria, resort meeting destinations or meeting destinations in a particular region, such as the Okanagan-Similkameen.

3.14 Target Western Canadian planners for repeat business.

An increase in meeting business from British Columbia and Alberta will come primarily from companies and associations which are already holding some of their meetings in the province. Marketing should therefore be directed at encouraging repeat business, rather than finding entirely new organizations based in Western Canada to hold meetings here.

3.15 Increase marketing of pre and post meeting activity.

Given the importance of pre and post convention trips and of selling spousal activities to meeting attendees, marketing should stress the presence of tourist activities, entertainment and unique shopping. It should be kept in mind that the major concern of the meeting planner is to choose a location that will be attractive to members (especially in the case of voluntary attendance). Creating an awareness of the amenities available in an area, such as attractions, then becomes particularly important.

3.16 Recognize the relationship between the meeting planner and meeting attendee in the decision making process related to selecting a meeting site and utilize this knowledge in the development of marketing.

This initiative refers to an incorporation of attitude rather than action. The criteria for choosing a meeting site will vary depending on the type of meeting i.e. whether attendance is voluntary or compulsory.

A dynamic relationship exists between the meeting planner and the meeting attendee in the choice of a meeting site. If attendance at the meeting is voluntary (as often as with an association meeting), the meeting planner must "sell" potential meeting attendees on the site, which requires being convinced personally as a prerequisite. The planner requires a location that will draw attendees. Often the acceptability of the location to spouses affects the attendance levels. Forty-five percent of all meeting attendees get their information about a specific area from the meeting planner indicating that, to maximize attendance at these meetings, planners should be supplied with information about the site, local amenities and pre and post meeting activities to be distributed to potential attendees.

If a meeting has compulsory attendance, i.e. a meeting of all sales managers for a company, a planner's criteria for choosing a site may change. Although location may still be a primary concern, the planner may be more inclined to choose a site unknown by meeting attendees, such as a resort location where attendees can be confined to a specific area.

Determining the motivating factors behind a planners choice of a meeting site and recognizing the demands that must be satisfied will indicate ways in which the site can be more effectively marketed or the types of meetings which represent the best potential.

3.17 Coordinate marketing between all levels of industry and government.

To most effectively and efficiently market the province as a meeting destination, industry and government must cooperate in targeting specific markets and presenting information. A coordinated marketing plan (as discussed in 3.1) is needed for presenting the province as a meeting destination. This would ensure that contradictory messages are not supplied to meeting planners. It would also create a more efficient approach to marketing. For example, if more than one facility or region is attending a trade show the cost involved could be shared.

3.18 Investigate the possibility of simplifying the customs clearance process for meeting planners.

In the course of the research for this study, some American meeting planners noted that the anticipated difficulty of going through Canada Customs is a deterrent to holding a meeting here. This was noted particularly by those planners planning a trade show where a large amount of materials must pass through customs. The possibility for simplifying the customs clearance process for meeting planners should be addressed by the Ministry of Tourism and any resulting change in the process should be communicated to planners.

APPENDIX A

PRODUCT INVENTORY QUESTIONNAIRE

FACILITY: ______________________

ADDRESS: ______________________

____

POSTAL CODE: ______________________

TELEPHONE NUMBER: ____________ COMPLETED BY: ____________

TELEFAX NUMBER: ____________ TITLE: ____________

TELEX NUMBER: ____________

BRITISH COLUMBIA MEETING MARKET STUDY

PRODUCT INVENTORY

Return to:

Pannell Kerr Forster, Management Consultants
Suite 2000, Box 12517
1066 West Hastings Street
Vancouver, B.C. V6E 3X1

PRODUCT INVENTORY

Please complete each section as it relates to your facility. Capacity within this questionnaire means number of people.

FACILITY TYPE

	Date Constructed	Date of Last Renovation
Hotel		
Motel		
Motor Inn		
Convention Centre		
Conference Centre		
Educational Inst.		

	Date Constructed	Date of Last Renovation
Recreation Centre		
Stadium		
Recreation Centre		
Resort		
Ski Resort		
Other (Please specify)		
______		

Do you have a regular ongoing renovation programme? Yes ______ No ______

A. MEETING FACILITIES

Please provide the capacity (number of people) for the following set up styles:

Largest Theatre Capacity ______

Largest Classroom Capacity ______

Largest Reception Capacity ______

Largest Banquet Capacity ______

Total Number of Meeting Rooms ______

Total Square Feet (Lobby, Mezzanine, Concourse) for Registration and Displays ______

Total Number of Exhibit Booths (10' x 10') you could accommodate (if applicable) ______

MEETING ROOM INVENTORY

Please indicate individual as well as combined room capacity, according to the following configurations. Where applicable, include total exhibit booths (10' x 10') that could be accommodated.

Name of Room	Square Feet	Capacity (Number of People)				Exhibit Booths (10'x 10')
		Theatre	Classroom	Banquet	Reception	

B. GUEST ACCOMMODATION

- Guest Rooms

Please enter the total number of guest rooms of each type:

Singles ______
Doubles ______
Queen Size ______
King Size ______
Suites ______

Self Contained (Kitchens) ______
Non-Smoking Rooms ______
Equipped for Handicapped ______
Total Guest Rooms ______

- Room Amenities

Please check each amenity which is provided in all (or most) of your rooms:

Television: ______ Satellite ______ Cable ______ Local
Radio: ______ AM/FM ______ Clock
Direct Dial Telephone ______
Room Service ______
Wake-Up Service ______
Air Conditioning ______
Mini-Bar ______
Valet ______

Balcony ______

Other (Please Specify)
______________________ ______
______________________ ______
______________________ ______

C. GUEST SERVICES

- Business Related

Please check each item that you are able to provide:

Blackboards ______
Flipcharts ______
Lecterns ______
Microphones ______
Overhead Projectors ______
Audio Recorders ______
Video Recorders ______
Slide Projectors ______
Movie Projectors ______
Screens ______
Stages ______
Public Address System ______

Closed Circuit Television ______
Secretarial ______
Telefaxing ______
Photocopying ______
Translation Services ______
Teleconferencing ______
Courier Service ______

Other (Please Specify)
______________________ ______
______________________ ______
______________________ ______

- Food and Beverage

Please indicate capacities (number of people) for each facility located in-house:

Capacity
Dining Room(s) ______ ______
Coffee Shop(s) ______ ______
Lounge(s) ______ ______

Capacity
Pub(s) ______ ______
Bar(s) ______ ______

C. GUEST SERVICES (CONTINUED)

o Catering

Please check if your facility has an in-house catering department, or if this service is contracted out:

In-House ______ Contracted Out ______

o Recreational

Please check those recreational facilities you have on-site, along with those off-site facilities available within a 15 kilometre radius:

	On-Site	Off-Site (within 15 km)
Exercise Room	______	______
Sauna	______	______
Jacuzzi	______	______
Indoor Pool	______	______
Outdoor Pool	______	______
Beach	______	______
Hiking Trails	______	______
Fishing	______	______
Hunting	______	______
Horseback Riding	______	______
Volleyball/	______	______
Badminton	______	______

	On-Site	Off-Site (within 15 km)
Tennis	______	______
Racquetball/Squash	______	______
Downhill Skiing	______	______
Cross Country Skiing	______	______
Sailing/Boating	______	______
Skating	______	______
Bicycling	______	______
Golf	______	______
Jogging Circuit	______	______
Other (Please Specify)		
______________	______	______

o Other Services

Please check each facility or service that you provide:

Gift Shop ______
Florist ______
Valet Parking ______
Car Rental ______
Limo Service ______
Covered Parking ______
Express Checkout ______
Safety Deposit Box ______

Shuttle Bus ______
Tour Service ______
Concierge ______
Massage ______
Beauty Parlour ______

Other (Please Specify)
______________ ______

o Attractions

Please check each attraction that is available within a 15 kilometre radius of your facility:

Art Gallery ______
Museums/Historical Sites ______
Botanical Gardens ______

Cultural (Live Theatre, etc.) ______
Shopping ______

Other (Please Specify)
______________ ______

C. GUEST SERVICES (CONTINUED)

o Location

Are you located in the Downtown area? Yes _____ No _____
If not, how far are you from the Downtown area? _____ kilometres

How far are you from the airport? _____ kilometres

D. ADDITIONAL INFORMATION

Please add any additional information about your facility (waterfront, water/mountain view, natural setting, heritage, accessibility, etc.), which makes it unique or adds to its marketability.

APPENDIX B

MARKET PROFILE QUESTIONNAIRE

FACILITY: ______________________

ADDRESS: ______________________

____

POSTAL CODE: ______________________

TELEPHONE NUMBER: __________ COMPLETED BY: __________

TELEFAX NUMBER: __________ TITLE: __________

TELEX NUMBER: __________

BRITISH COLUMBIA MEETING MARKET STUDY

MARKET PROFILE

Return to:

Pannell Kerr Forster, Management Consultants
Suite 2000, Box 12517
1066 West Hastings Street
Vancouver, B.C. V6E 3X1

MARKET PROFILE

Please provide the total number of meeting groups booked in your facility, starting with January 1, 1988 and ending with December 31, 1988, according to the timeframes identified below.

Count only those groups with 100+ registered attendees.

AREA OF INTEREST	January 1 to March 31	April 1 to June 30	July 1 to August 31	September 1 to October 31	November 1 to December 31

Type of Organization Booking Facilities

Please indicate how many groups (100+) you booked in each category in 1988:

o Corporations/Gov't					
o Associations					
o Sports Groups					
* Other (Specify)					

* special interest groups, professional lecturers, etc.

Size of Meeting Groups

Please give the size of your meeting groups in 1988, including only those groups of 100 or more:

o Largest Group					
o Smallest Group					
o Average Group					

Organization's Scope of Responsibility

Please indicate how many groups held meetings (100+) in each category in 1988:

o Local					
o Regional					
o Provincial					
o National					
o North American					
o International					

MARKET PROFILE (CONTINUED)

AREA OF INTEREST	January 1 to March 31	April 1 to June 30	July 1 to August 31	September 1 to October 31	November 1 to December 31

Purpose of Meeting

Please indicate the number of groups (100+) that were booked in 1988 for the following purpose:

o Board Meetings					
o Sales Meetings					
o Educational Seminars/ Symposiums					
o Professional/ Technical Meetings					
o Conventions/ Conferences					
o Trade Shows					
o Incentive Trips					
o Other (Specify)					

Origin of Business

Please indicate how many groups (100+) that were booked in 1988 have their headquarters in each region:

o British Columbia					
o Alberta					
o Ontario					
o Other Canada					
o Washington State					
o Oregon					
o California					
o Washington, D.C.					
o Other Eastern U.S.A.					
o Other Western U.S.A.					
o Great Britain					
o Europe					
o Asia					
o Other (Specify)					

* See reverse for a listing of "Other Western U.S.A." States.

OTHER WESTERN U.S.A. STATES

AK - Alaska
HI - Hawaii
ID - Idaho
MT - Montana
WY - Wyoming
UT - Utah
CO - Colorado
NV - Nevada
AZ - Arizona
NM - New Mexico
ND - North Dakota
SK - South Dakota
MN - Minnesota
IA - Iowa
OK - Oklahoma
NE - Nebraska
KS - Kansas
MO - Missouri
AR - Arkansas
TX - Texas

MARKET PROFILE (CONTINUED)

AREA OF INTEREST	January 1 to March 31	April 1 to June 30	July 1 to August 31	September 1 to October 31	November 1 to December 31
Origin of Meeting Attendees					
Please indicate how many meeting attendees originated from the following areas (if this breakdown of information is available):					
o British Columbia					
o Alberta					
o Ontario					
o Other Canada					
o Washington					
o Oregon					
o California					
o Washington, D.C.					
o Other Eastern U.S.A.					
o Other Western U.S.A.					
o Great Britain					
o Europe					
o Asia					
o Other (Specify)					
Additional Meeting Group Information (please estimate as accurately as possible, including data only for groups of 100 or more)					
o Average group expenditure on food and beverage functions					
o Number of new groups using your facility as a meeting destination					
o Number of repeat groups using your facility as a meeting destination					
o Percentage of total meeting space booked by groups (100+)	%	%	%	%	%
o Average length of stay of meeting groups (100+)	days	days	days	days	days
o Average room nights booked by meeting groups					

APPENDIX C

SURVEY OF MEETING PLANNERS

MEETINGS MARKET STUDY

SURVEY OF MEETING PLANNERS

Hello. May I please speak to [NAME FROM LIST]? Thank you.

IF NAMED INDIVIDUAL IS NOT PRESENT, SCHEDULE CALLBACK

IF NAMED INDIVIDUAL IS NOT WORKING THERE, ASK:

> May I please speak to the person in your organization who is most responsible for planning your conferences and meetings.
>
> IF YES, CONTINUE
>
> IF NO, SCHEDULE CALL-BACK

Hello, this is ______ calling from Campbell Goodell Consultants, a research firm in Vancouver, Canada. We are conducting a study on behalf of the British Columbia Ministry of Tourism and the Canadian Government.

Are you the person who is most responsible for planning the conferences and meetings for your organization?

IF YES: May I have a few minutes of your time to ask you a few questions? Thank you?

IF NO: ASK FOR CORRECT RESPONDENT AND REINTRODUCE

PERSUADERS

This survey is part of a year-long study of the meetings market in British Columbia. The results will be used by the government of British Columbia to improve the services and facilities which are provided for conferences and meetings which are held in the province.

Your participation in this study is very important, because. you represent many other planners across North America.

In order to get a sample which represents all planners, it is necessary that we interview everyone who has been randomly selected from a list of meeting planners.

All the answers you give to my questions will be strictly confidential. Your name will never be connected with your answers in any way.

This survey involves the meetings you have planned in the recent past as well as those you will plan in the next two or three years.

Q1. First, how many people attended the largest meeting your organization held during the past year?

IF FEWER THAN 300 (100 IN THE NORTHWEST) - TERMINATE

NOTE: THIS NUMBER INCLUDES ONLY REGISTRANTS, NOT SPOUSES OR FAMILY

______ NUMBER OF REGISTRANTS

9998. DON'T KNOW
9999. REFUSED

Q2. In what city did you hold this meeting?

ONE FRAME

Q3. And how many meetings did your organization hold in the past year with between 1 and 100 people attending?

NOTE: THIS NUMBER INCLUDES ONLY REGISTRANTS, NOT SPOUSES OR FAMILY

______ NUMBER

9998. DON'T KNOW
9999. REFUSED

INTERVIEWER FRAME:

1. R REPLIES FOR ALL OF THE ORGANIZATIONS' MEETINGS
2. R REPLIES ONLY FOR A FRACTION OF THE ORGANIZATIONS' MEETINGS
3. NOT KNOWN WHAT PROPORTION OF THE ORGANIZATIONS' MEETINGS R IS REPORTING ABOUT

Q4. And how many with 100 to 500 people attending?

SKIP WHEN NUMBER GIVEN IN Q1 IS EXCEEDED.

______ NUMBER

9998. DON'T KNOW
9999. REFUSED

Q5. How many with 500 to 1000 (people attending)?

SKIP WHEN NUMBER GIVEN IN Q1 IS EXCEEDED.

_______ NUMBER

9998. DON'T KNOW
9999. REFUSED

Q6. And how many with more than 1000?

SKIP WHEN NUMBER GIVEN IN Q1 IS EXCEEDED.

_______ NUMBER

9998. DON'T KNOW
9999. REFUSED

Q7. Were any of these meetings were held in British Columbia?

1. YES | SKIP TO Q9

2. NO
3. DON'T KNOW
4. REFUSED

Q7A. ASK IF Q7 EQ 2,3 OR 4. Is it possible that your organization might hold meetings in British Columbia in the future?

I. YES | SKIP TO Q13

2. NO
3. DON'T KNOW
4. REFUSED

Q8. ASK IF Q 7A EQ 2, 3 OR 4. Is there any specific policy in your organization that prevents you from holding meetings in British Columbia?

1. YES | SKIP TO Q32

2. NO |
3. DON'T KNOW | SKIP TO Q28
4. REFUSED |

Q9. ASK IF Q7 EQ 1 AND Q3 NE 0,9998,9999. A moment ago you said that you held [RECOVER FROM Q3] meetings with 1 to 100 attendees in the past year. How many of these meetings were held in British Columbia?

_____ NUMBER OF MEETINGS

9998. DON'T KNOW
9999. REFUSED

Q10. ASK IF Q7 EQ 1 AND Q4 NE 0,9998,9999. Of the [RECOVER FROM Q4] meetings with 100 to 500 attendees (which you held in the past year), how many were held in British Columbia?

_____ NUMBER OF MEETINGS

9998. DON'T KNOW
9999. REFUSED

Q11. ASK IF Q7 EQ 1 AND Q5 NE 0,9998,9999. Of the [RECOVER FROM Q 5] meetings with 500 to 1000 attendees (which you held in the past year), how many were held in B.C.?

_____ NUMBER OF MEETINGS

9998. DON'T KNOW
9999. REFUSED

Q12. ASK IF Q7 EQ 1 AND Q6 NE 0,9998,9999. Of the [RECOVER FROM Q6] meetings with over 1000 attendees (which you held in the past year), how many were held in B.C.?

_____ NUMBER OF MEETINGS

9998. DON'T KNOW
9999. REFUSED

Q13. Do you think the number of meetings your organization will hold in the next three years will increase or decrease, compared to the last three years? Will it (increase/decrease) a lot or just a little?

1. INCREASE A LOT
2. INCREASE JUST A LITTLE
3. STAY THE SAME
4. DECREASE JUST A LITTLE
5. DECREASE A LOT
6. DON'T KNOW
7. REFUSED

Q14. Do you plan to hold any meetings in British Columbia during the next three years? IF YES: Are these plans firm?

1. YES - FIRM
2. YES - NOT FIRM
3. YES - BOTH FIRM AND NOT FIRM
4. PLANS NOT YET MADE
5. DO NOT PLAN TO MEET IN B.C.

6. DON'T KNOW
7. REFUSED

Q15. ASK IF Q14 EQ 5. What are the specific reasons that you do not plan to hold any meetings in British Columbia?

PROBE THOROUGHLY
THREE FRAMES

Q16. Which cities in Canada would you consider as the location for a future meeting of your organization (if you were to plan a meeting in Canada)? Any others?

FIVE FRAMES

1. TORONTO
2. MONTREAL
3. VANCOUVER
4. HALIFAX
5. QUEBEC CITY
6. WINNIPEG
7. CALGARY
8. VICTORIA
9. EDMONTON
10. WHISTLER

11. OTHER (SPECIFY - ONE FRAME)

12. DON'T KNOW
13. REFUSED
14. NO FURTHER RESPONSE

Q17. How familiar are you with Vancouver (British Columbia) in terms of its hotels and meetings facilities? Are you very familiar, somewhat familiar, not very familiar, or not at all familiar?

1. VERY FAMILIAR
2. SOMEWHAT FAMILIAR
3. NOT VERY FAMILIAR
4. NOT AT ALL FAMILIAR

5. DON'T KNOW
6. REFUSED

Q18. And how familiar are you with Vancouver as a tourist destination, that is, its restaurants, attractions, shopping, night life and so forth?

1. VERY FAMILIAR
2. SOMEWHAT FAMILIAR
3. NOT VERY FAMILIAR
4. NOT AT ALL FAMILIAR

5. DON'T KNOW
6. REFUSED

Q19. ASK IF Q17 OR Q18 EQ 1,2 OR 3. In general, what would you say is the most attractive feature of Vancouver as a site for a meeting of your organization?

ONE FRAME

Q20. ASK IF Q17 OR Q18 EQ 1,2, OR 3. What is the second most attractive feature of Vancouver as a meeting site?

ONE FRAME

Q21. ASK IF Q17 OR Q18 EQ 1,2, OR 3. Are there any major barriers to your organization holding a meeting in Vancouver?

IF YES: What are they?

PROBE THOROUGHLY
THREE FRAMES
IF R MENTIONS TRANSPORTATION, COST OR CUSTOMS, PROBE TO DETERMINE IF THIS IS A MAJOR OR A MINOR PROBLEM

Q22. Besides Vancouver, what other city or town in British Columbia are you most familiar with, in terms of its hotels and meetings facilities?

1. HARRISON
2. KAMLOOPS
3. KELOWNA
4. PENTICTON
5. PRINCE GEORGE
6. VICTORIA
7. WHISTLER

8. OTHER (SPECIFY - ONE FRAME)

9. NONE/DON'T KNOW/REFUSED | SKIP TO Q28

Q23. ASK ONLY IF Q22 NE 9. And how familiar are you with the hotels and meeting facilities in [NAME FROM Q22]? (Are you very familiar, somewhat familiar, not very familiar or not at all familiar?)

1. VERY FAMILIAR
2. SOMEWHAT FAMILIAR
3. NOT VERY FAMILIAR
4. NOT AT ALL FAMILIAR

5. DON'T KNOW
6. REFUSED

Q24. ASK ONLY IF Q22 NE 9. How familiar are you with [NAME FROM Q22] as a tourist destination, that is, its restaurants, attractions, shopping, night life and so forth?

1. VERY FAMILIAR
2. SOMEWHAT FAMILIAR
3. NOT VERY FAMILIAR
4. NOT AT ALL FAMILIAR

5. DON'T KNOW
6. REFUSED

Q25. ASK IF Q23 OR Q24 EQ 1,2 OR 3. In general, what would you say is the most attractive feature of [NAME FROM Q22] as a site for meetings of your organization?

ONE FRAME

Q26. ASK IF Q23 OR Q24 EQ 1, 2 OR 3. What is the second most attractive feature of [NAME FROM Q22]?

ONE FRAME

Q27. ASK IF Q23 OR Q24 EQ 1, 2 OR 3. Are there any major barriers to your organization holding a meeting in [NAME FROM Q22]?

IF YES: What are they?

PROBE THOROUGHLY
THREE FRAMES
IF R MENTIONS TRANSPORTATION, COST OR CUSTOMS, PROBE TO DETERMINE IF THIS IS A MAJOR OR A MINOR PROBLEM

Q28. Next, have you seen any advertising for specific meeting destinations or facilities in British Columbia in the past year?

1. YES

2. NO |
3. DON'T KNOW | SKIP TO Q30
4. REFUSED |

Q29. Where did you see this advertising?

1. DIRECT MAIL CAMPAIGN (THE "FIVE SENSES")
2. BROCHURE RECEIVED IN THE MAIL
3. MAGAZINES/OTHER PUBLICATIONS
4. PERSONAL VISIT IN MY OFFICE
5. FAMILIARIZATION TRIP
6. LOCAL PRESENTATION
7. OTHER (SPECIFY - ONE FRAME)

8. DON'T KNOW/DON'T REMEMBER
9. REFUSED

Q30. What meeting planners' publications do you receive regularly? Any others?

FIVE FRAMES

1. ASSOCIATION MANAGEMENT
2. BEST'S INSURANCE CONVENTION GUIDE
3. CANADIAN ASSOCIATION
4. CANADIAN INDUSTRY SHOWS AND EXHIBITIONS
5. CONFERENCE WORLD
6. CONFERENCES AND EXHIBITIONS INTERNATIONAL
7. CONVENTION WORLD
8. CORPORATE MEETINGS AND INCENTIVES
9. DELEGATE
10. MEDICAL MEETINGS
11. MEETINGS AND CONVENTIONS
12. MEETINGS AND INCENTIVE TRAVEL
13. SUCCESSFUL MEETINGS
14. TAGUNGS WIRTSCHAFT
15. WESTERN MEETING NEWS

16. OTHER SPECIFIC TRADE MAGAZINES
17. OTHER

18. NONE
19. DON'T KNOW
20. REFUSED
21. NO FURTHER RESPONSE

Q31. Why would you consider a city as a meeting site for the first time?

PROBE THOROUGHLY
THREE FRAMES

Q32. What is the best way for you to receive information about British Columbia's meeting sites and facilities?

TWO FRAMES

1. DIRECT MAIL CAMPAIGN
2. BROCHURE RECEIVED IN THE MAIL
3. MAGAZINES/TRADE PUBLICATIONS
4. PERSONAL VISIT IN MY OFFICE (DIRECT SALES)
5. FAMILIARIZATION TRIP
6. LOCAL PRESENTATION
7. TELEMARKETING
8. TRADE SHOWS
8. OTHER (SPECIFY - ONE FRAME)

9. DON'T KNOW/DON'T REMEMBER
10. REFUSED
11. NO FURTHER RESPONSE

Q33. Suppose a video tape were made showing the facilities available in Vancouver which was appropriate to the sort of meeting you had to schedule. It would be accompanied by a short information sheet and sent to you in the mail. Would you rate this as an:

1. Excellent,
2. Good,
3. Only fair, or
4. Poor way to communicate information?

5. DON'T KNOW
6. REFUSED

Q34. Finally, what is the principal activity of your organization?

1. MEETING PLANNING (PRIORITY)
2. AGRICULTURE
3. FISHING AND TRAPPING
4. MINING/QUARRY/OIL DRILLING
5. MANUFACTURING
6. CONSTRUCTION
7. TRANSPORTATION AND STORAGE
8. COMMUNICATION AND OTHER UTILITIES
9. WHOLESALE TRADE
10. RETAIL TRADE
11. FINANCE, INSURANCE AND REAL ESTATE
12. BUSINESS SERVICES
13. GOVERNMENT
14. EDUCATION
15. HEALTH AND SOCIAL SERVICES
16. ACCOMMODATION, FOOD AND BEVERAGE SERVICES

17. OTHER
18. DON'T KNOW/
19. REFUSED

ENTER AND VERIFY NAME AND TELEPHONE NUMBER

Those are all my questions. Thank you very much for your time.

Q35. ENTER STATE/PROVINCE OF RESPONDENT

CODE TO COME

Q36. ENTER TIME AND DATE

Q37. ENTER LENGTH OF INTERVIEW

Q38. ENTER CUBICLE NUMBER

Q39. ENTER INTERVIEWER I.D.

APPENDIX D

MEETING ATTENDEE DIARY

1. In what province, state or country do you live?

____

2. What is your postal or zip code? _______________
If you live in BC — Skip to Question 11
If you live outside BC — Continue to Question 3

3. How many nights, if any, were you away from home *before* entering BC? ______ nights

4. Your first day in BC was mo ____ dy ____

5. Is BC your major destination on this trip?
☐ Yes ☐ No

6. If no, what province/state/country is your major destination?

____

7. Is this your first visit to British Columbia?
☐ Yes — Skip to Question 9
☐ No — Continue at Question 8

8. If no, How many trips of one night or more have you taken to BC in the past 3 years?
______ business trips
______ business & pleasure trips
______ pleasure trips

9. Prior to your trip did you see any advertisements for travel to BC?
☐ I saw no advertising — Continue at Question 10
I saw advertising in the following media
☐ TV ☐ Magazine
☐ Newspaper ☐ Other medium
☐ I saw advertising, but I can't recall where

10. Did you request and receive any travel information about BC before you left for this trip

...from a travel agent?	☐ Yes	☐ No
...from Tourism BC?	☐ Yes	☐ No
...from your event's organizer?	☐ Yes	☐ No
...from other sources?	☐ Yes	☐ No

11. How many nights in total do you expect to be away from home on this trip?
______ nights in total

12. How many of the nights you spend away from home on this trip will be spent in BC?
______ nights in BC

13. Please check your MAIN method(s) of travel while in BC. (If your home is outside BC, also check the MAIN method(s) of travel you used to get to BC.

	WITHIN BC	TO BC
Own Automobile	☐	☐
Rented Automobile	☐	☐
Own Motorhome/ Camper	☐	☐
Bus	☐	☐
Air	☐	☐
Train	☐	☐
Cruise Ship	☐	☐
Ferry	☐	☐
Other	☐	☐

14. Please check those of the following which best describe the MAIN purposes of this trip

BUSINESS
☐ Attend conference/convention
☐ Attend corporate meeting
☐ Attend trade show
☐ Other business

PLEASURE
☐ Visit friends/relatives
☐ Touring trip
☐ City trip
☐ Personal matters
☐ Outdoors trip
☐ Wilderness/adventure trip
☐ Resort vacation
☐ Cruise
☐ Visit theme park
☐ Exhibition/special event

15. Now please go back and place a circle around the box which best describes the ONE MAJOR purpose of this trip.

16. Please indicate below the NUMBER of business, business and pleasure and pleasure trips of one night or more that you have taken in the past 12 months to any destination

	Less than 1,000 miles	1,000 miles or more
Business trips	____ trips	____ trips
Business & pleasure trips	____ trips	____ trips
Pleasure trips	____ trips	____ trips

17. Did your employer (or other organization) require you to attend this event, or did you make the decision yourself?
☐ Employer/organization required
☐ Decided myself
☐ Other (i.e. incentive trip)

18. The total number of people (including yourself) in your immediate travelling party is
______ people

19. Please indicate the total number of males/females (including yourself) in your immediate travelling party in each of the following age categories

	Under 15	15 18	19 24	25 34	35 44	45 54	55 64	65+
MALE								
FEMALE								

20. You are ☐ Male ☐ Female

21. Your age
☐ 15 - 18
☐ 19 - 24 ☐ 25 - 34 ☐ 35 - 44
☐ 45 - 54 ☐ 55 - 64 ☐ 65+

22. Your TOTAL household income in Canadian funds is
☐ Under $20,000 ☐ $20,000 to 39,999
☐ $40,000 to 59,999 ☐ $60,000+

23. What percentage of the costs of this trip is being paid for through business?
______ percent

24. How does British Columbia compare to other places where you have attended conferences/conventions, corporate meetings or trade shows? Compared to other locations, BC is
☐ much better
☐ a little better
☐ about as good
☐ a little poorer
☐ much poorer
☐ no experience with locations outside BC

25. And finally, please write any further comments
...on what you liked *best* about the BC location where your meeting was held

____
____
____

...on what you like *least* about the BC location where your meeting was held

____
____
____

...on your experiences in British Columbia generally

____
____
____

Please mail this back to us in one of the business-reply envelopes provided (Canadian or U.S.). Thank you again for your help!

If you have misplaced the return envelope, we would very much appreciate your returning the diary to us at

B.C. BUSINESS VISITOR SURVEY
Suite 502, 1755 West Broadway
Vancouver, BC, Canada
V6J 4S5

Province of British Columbia
Ministry of Tourism and Provincial Secretary

British Columbia Business Visitor Survey

Dear Visitor

Welcome to Super, Natural British Columbia. Thank you for participating in our business trave study.

The questionnaire is like a daily diary. Pleas jot down where you stayed and what you did an purchased each day. This daily record will be ver helpful to Tourism British Columbia in making sur the very best is provided for business travellers.

You'll also find there are a few basic question about you on the back panel. If you're travelling with others please be sure to answer those questions or behalf of your whole travelling party.

In appreciation of your cooperation we wil send you a beautiful frameable quality poster as small memento of your visit to British Columbia.

We hope your trip to British Columbia i productive and truly enjoyable.

Thank you for your help

Bill Reid

Honourable Bill Reid
Minister of Tourism an
Provincial Secretary

PS Please don't forget to post this diary on you last day in BC — and also be sure to fill ou the poster request card.

Thanks again!

Meeting Location _______________

№ 4613

FOLLOW THIS EXAMPLE

What you and your party did each day while in B.C.

EACH DAY'S DATE: Beginning with the first day that you spent away from home, in B.C.

	SAMPLE	DAY 1	DAY 2	DAY 3	DAY 4	DAY 5	DAY 6	DAY 7	DAY 8	DAY 9	DAY 10	DAY 11	DAY 12	DAY 13	DAY 14
EACH DAY'S DATE	June 1														
CITY/TOWN/AREA WHERE YOU STAYED EACH NIGHT.	Victoria														
TYPE OF ACCOMMODATION.	M														
DAILY ACTIVITIES — ATTENDED: CONFERENCE/CONVENTION	✓														
CORPORATE MEETING															
TRADE SHOW	✓														
SPORTING EVENT															
FESTIVAL/CULTURAL/SPECIAL EVENT	✓														
ACTIVITIES: WENT SHOPPING															
TOOK A TOUR															
SIGHTSEEING	✓														
TRAVELLING/PASSING THROUGH															
CONDUCTED BUSINESS															
HUNTING															
FISHING															
OTHER OUTDOOR ACTIVITIES															
SKIING															
GOLF															
FITNESS ACTIVITIES															
OTHER SPORTING ACTIVITIES															
NIGHTLIFE	✓														
VISITED: BEACH/LAKESHORE															
MUSEUM GALLERY/HISTORIC SITE															
FAIR/AMUSEMENT PARK															
GARDENS PARKS															
FRIENDS RELATIVES															

PLEASE ESTIMATE WHAT YOU AND YOUR PARTY SPENT EACH DAY ON EACH OF THE FOLLOWING (in Canadian $)

	SAMPLE	DAY 1	DAY 2	DAY 3	DAY 4	DAY 5	DAY 6	DAY 7	DAY 8	DAY 9	DAY 10	DAY 11	DAY 12	DAY 13	DAY 14
ACCOMMODATION $	65														
AUTO TRANSPORTATION (gas, repairs, rentals) $	10														
OTHER TRANSPORTATION (ferries, buses, taxis) $															
MEETING OR PACKAGE OR CRUISE (SEE NOTE) $															
RESTAURANT MEALS/REFRESHMENTS $															
GROCERIES BEVERAGES $	40														
RECREATION $															
ENTERTAINMENT $															
SHOPPING SOUVENIRS $	20														
OTHER EXPENSES $	10														
TOTAL EXPENDITURES FOR THE DAY $	145														

Province of British Columbia
Ministry of Tourism and Provincial Secretary

NOTES ON TYPES OF ACCOMMODATION

- Please code the type of accommodation you use each night, using the single letter code indicated below

H — Hotel
M — Motel
R — Resort
B — Bed and Breakfast
T — Trailer Tent/Camper
C — Cruise Ship
F — With friends or relatives
O — Other
X — Did not spend the night in BC

NOTES ON MEETINGS PACKAGES, PACKAGED TOURS AND CRUISES

If your meeting was pre-paid in a package, with registration, hotel and meals all paid at once, or if you go on a packaged tour or cruise during your stay in BC, please follow the directions below

- Divide the total amount you paid for the meeting, tour or cruise package by the number of days you spent at the meeting, or on the tour or cruise.
- Enter the result in each column representing the days you spent in the activity. Please include only those days spent in BC. This figure goes on the row labelled "MEETING OR PACKAGE OR CRUISE".
- If you are on a prepaid meeting, tour or cruise package, place an "X" beside each of the specific services provided in your package for each day covered by the package.
- Enter additional expenditures (beyond the package price) as you normally would in the appropriate row.

Here is an example of how you would complete the expenditures section if your meeting package cost $600, lasted three days ($200/day) and included accommodations, meals and entertainment, and you also did some extra shopping.

ACCOMMODATION $	X	X	[illegible]
AUTO TRANSPORTATION (gas, repairs, rentals) $			
OTHER TRANSPORTATION (ferries, buses, taxis) $			
MEETING OR PACKAGE OR CRUISE (SEE NOTE) $	200	200	[illegible]
RESTAURANT MEALS/REFRESHMENTS $	X	X	[illegible]
GROCERIES BEVERAGES $			
RECREATION $	X	X	[illegible]
ENTERTAINMENT $			
SHOPPING SOUVENIRS $	[illegible]		[illegible]
OTHER EXPENSES $			
TOTAL EXPENDITURES FOR THE DAY $	[illegible]	[illegible]	[illegible]